

Historic, Archive Document

Do not assume content reflects current scientific knowledge, policies, or practices.

aHD9000

iW 675



United States
Department of
Agriculture

c3

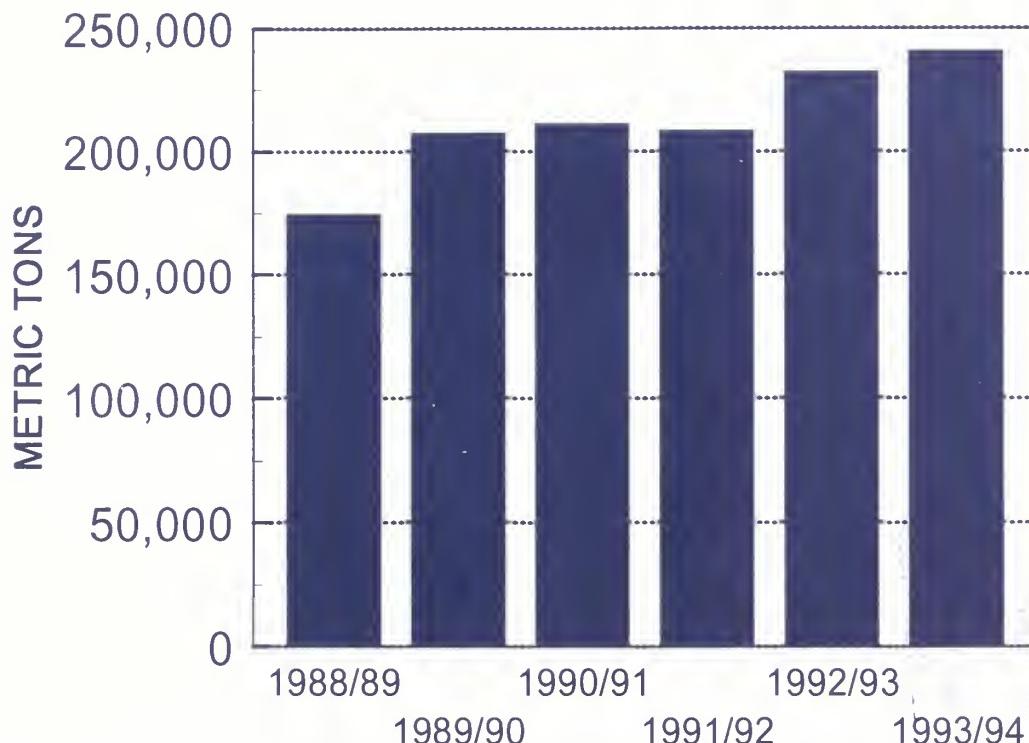
Foreign
Agricultural
Service

Circular Series
FHORT 6-94
June 1994

Sta

World Horticultural Trade & U.S. Export Opportunities

NEW ZEALAND APPLE EXPORTS RISE WITH DIVERSIFIED VARIETIES



Source: New Zealand Dept. of Statistics

H
SOC

New Zealand's apple exports continue to expand in the face of strong competition from other suppliers. Prospects have improved over the past few years as tree removal programs have enhanced the mix of varieties marketed by the Apple and Pear Marketing Board (APMB). Replanting efforts have focused on varieties (e.g., Royal Gala, Braeburn, Fuji, and Fiesta) that show promise in export markets. The APMB is committed to providing new varieties to meet the evolving taste preferences of consumers in export markets. The APMB's US\$3.8 million promotional budget for 1992/93 covered a range of activities, including participation in trade fairs and advertising in trade publications. The Board recently launched a full media strategy promoting the "ENZA" brand of apples. [For further details on the outlook for competition from New Zealand's horticultural industry, see article on page 26.]

Approved by the World Agricultural Outlook Board - USDA

For further information, contact:
U.S. Department of Agriculture
Foreign Agricultural Service
Horticultural and Tropical Products Division
AG Box 1049
Washington, DC 20250-1049

Telephone: 202-720-6590
Fax: 202-720-3799

Frank J. Piason, Director
Howard R. Wetzel, Deputy Director for Analysis
Robert B. Tisch, Acting Deputy Director for Marketing

ANALYSIS

Casey Bean	202-720-4620	Fresh deciduous fruit, apple juice, olives, and Asia-specific issues
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Ross Kreamer	202-720-9903	Canned deciduous fruit, wine, table grapes, kiwifruit, beer, hops, NAFTA, PL-480, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, tropical fruit, avocados, nursery products, cut flowers, and South American-specific issues
Samuel Rosa	202-720-9792	Fresh citrus, fruit juices, honey, and CBI-specific issues
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, and FAO citrus liaison
Mark Thompson	202-720-6877	Circular editor, fresh and processed potatoes, dried fruit, trade forecasts, and cross-commodity issues

MARKETING

Laura Davis	202-720-2252	Apples, strawberries, blueberries, and fresh tomatoes
Ted Goldammer	202-720-8498	Wine, brandy, and almonds
Jean Harman	202-720-0897	Fresh and canned pears, canned peaches, fresh cherries, honey, hops, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, pistachios, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, concord grapes, peaches, pears, plums, and cranberries
Steve Shnitzler	202-720-8495	Walnuts, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

For subscription questions or address changes, please contact Roberta McLean, 202-720-9445.

Table of Contents

	PAGE
EXPORT NEWS AND OPPORTUNITIES:	
Exports of U.S. Almonds to greece are rising sharply	6
GSM-102 applications for hops to Mexico continue to rise	6
 WORLD TRADE SITUATION AND POLICY UPDATES:	
French prune exporters target Italy for market promotion	7
Brazil's orange juice exports in 1994/95 forecast to increase slightly	7
Mexican orange juice exports continue to increase	7
 FEATURE ARTICLES:	
Production and Trade of Fresh Cut Flowers in Selected Countries	9
The 1994 Market Promotion Program	24
New Zealand's Horticultural Industry and the Competition Outlook in World Markets	26
U.S. Horticultural Trade with Caribbean Basin Initiative Beneficiary Countries Increases Again in 1993	33
 STATISTICS:	
U.S. Horticultural Exports Summary	4
U.S. Horticultural Imports Summary	5
FY 1994 GSM-102 Credit Guarantee Coverage	6
Brazil: Supply and Distribution of Oranges and FCOJ	8
Colombia: Cut Flower Area, Production and Exports	11
Ecuador and Bolivia: Production of Cut Flowers	14
Carnations: U.S. Production, Imports, Percent Imports of Supply, and Growers	15
U.S. Imports of Cut Flowers	16
U.S. Exports of Cut Flowers	22
European Union Imports of Cut Flowers	23
FY1994 Budget Ceilings for Market Promotion Program	25
New Zealand Kiwifruit Exports	28
New Zealand Apple Exports	30
New Zealand Wine Exports	32
U.S. Imports of Horticultural Products from CBI Beneficiary Countries	37
U.S. Exports of Horticultural Products to CBI Beneficiary Countries	40
U.S. Exports of Horticultural Products by Destination	54
U.S. Imports of Horticultural Products by Origin	57

Export Summary

U.S. horticultural exports rose again in March 1994, to \$687 million, up a hefty 11 percent over March 1993. Total exports for fiscal year 1994-to-date are \$3.9 billion, up 8½ percent over FY 1993. Increases took place in nearly every sector. Major increases in apples (up 24 percent to \$31 million), fresh citrus (up 21 percent to \$90 million), almonds (up 56 percent to \$72 million), and beer (up 24 percent to \$29 million) more than made up for declines in canned/prepared fruit (down 25 percent to \$13 million), hops (down 4 percent to \$11 million), and fresh vegetables (down 4 percent to \$94 million).

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
MAR 94

NAME		QUANTITY						VALUE (1,000 DOLLARS)										
GROUP	COMMODITY	CURR	LAST	CURR	MO	YR	TODATE	CURR	LAST	CURR	MO	YR	TODT	CURR	LAST	CURR	YR	LAST
FRUIT CITRUS MT	GRAPES FRUIT	53,896	87,731	283,544		312,962	444,767	26,066	42,226	142,259		155,833	222,290					
	LEMONS	12,752	9,271	72,636	69,151	127,336	7,863	5,581	46,788	54,308	99,598	99,598						
	ORANGES INCL TMPLS	80,513	73,717	264,869	247,347	562,596	37,765	37,994	128,140	134,864	279,503	279,503						
	OTHER CITRUS	3,168	6,264	16,702	20,086	16,313	2,531	4,116	14,361	15,838	16,507	16,507						
	Subtotal:----	150,330	174,986	637,753	650,147	1,154,014	74,227	89,919	331,549	360,845	618,001							
FR, FRT, NON-CIT MT	APPLES	45,230	50,601	307,976	371,815	487,808	25,133	31,184	187,743	229,327	297,141							
	AVOCADOS	1,824	661	3,384	3,063	14,185	2,066	706	3,910	3,095	14,223							
	CHERRIES SWT & TRT	245	41	467	203	25,747	354	163	846	498	111,252							
	GRAPEFRUIT	1,260	1,869	72,307	93,421	184,774	1,612	2,210	83,307	106,497	215,189							
	KIWIFRUIT	2,277	1,817	5,791	6,748	8,359	3,322	2,992	8,336	10,120	12,071							
	MELONS	4,460	3,448	27,560	26,948	196,473	2,733	2,625	15,647	16,596	74,192							
	PAPAYA	763	650	3,892	3,741	7,596	1,314	1,246	7,120	7,156	14,151							
	PEACHES & NCTRNS	290	186	3,575	2,910	63,998	387	241	3,499	2,831	57,507							
	PEARS	8,223	10,468	63,497	79,945	98,815	5,192	5,775	38,470	44,224	60,258							
	PLUMS/PRUNES	339	240	5,593	3,378	56,959	406	322	4,939	3,117	52,120							
	STRAWBERRIES	3,934	4,096	10,357	12,396	49,415	5,969	6,207	22,963	27,372	77,412							
	OTHER NON-CITRUS	11,703	11,814	17,087	20,721	53,452	1,328	1,778	15,313	18,720	53,860							
	Subtotal:----	70,556	75,897	521,492	625,294	1,243,586	49,780	55,953	392,099	469,558	1,039,381							
CND/PREP FRUIT MT	CHERRIES TRT CND	601	475	3,795	2,422	7,322	905	727	6,235	4,167	12,632							
	FRUIT MIXTURES	2,580	1,912	18,903	13,110	35,007	3,009	2,152	20,587	13,516	39,597							
	MARACHINO CHRY	321	479	2,413	2,493	4,912	562	930	4,732	8,814	9,706							
	PEACHES CANNED	2,195	1,159	10,456	8,711	21,390	2,424	1,242	10,421	5,495	20,960							
	PINEAPPLE CANNED	254	347	2,334	2,148	4,295	562	304	2,190	9,923	13,331							
	FRT PREP/PRES	6,458	5,110	33,454	30,328	61,466	5,549	40,866	34,625	75,437								
	OTHER CANNED FR	2,721	3,001	14,416	14,359	32,246	2,575	2,368	14,494	13,437	30,629							
	Subtotal:----	15,133	12,484	85,774	73,973	166,641	17,473	13,162	99,508	82,981	192,895							
DRIED FRUIT MT	PRUNES, DRIED	8,397	4,217	48,735	30,979	84,752	12,171	10,133	72,760	70,670	137,529							
	RAISINS, DRIED	8,505	9,376	59,163	60,815	121,529	12,277	15,145	82,835	95,356	180,885							
	OTHER DRIED FRUIT	1,496	1,863	10,782	11,321	19,865	3,309	3,545	26,918	28,355	49,237							
	Subtotal:----	18,398	15,457	118,681	103,116	226,148	27,758	28,825	182,514	194,383	367,651							
FROZEN FRUIT MT	BLUEBERRIES, FZN	902	440	4,994	2,767	8,600	1,619	714	8,935	4,362	15,058							
	STRAWBERRIES, FZN	694	1,724	5,092	9,659	16,017	1,990	2,414	6,547	12,934	20,864							
	OTHER FZN FRUIT	1,216	1,056	7,926	5,315	16,231	1,561	1,576	10,991	8,476	23,726							
	Subtotal:----	2,813	3,222	18,014	17,742	40,849	4,171	4,705	26,475	25,773	59,649							
FRT&VEG JUICE (SSE) KL	GRAPEFRUIT (SSE) KL	5,575	3,816	23,542	12,450	60,686	3,253	4,219	14,764	11,839	36,980							
	ORANGE JUICE NC	7,185	9,057	41,356	51,247	92,328	5,157	6,037	32,081	34,771	68,746							
	ORANGE JUICE CNC	38,193	20,971	148,009	151,301	349,893	12,941	8,335	69,345	10,737	10,737							
	OTHER JUICES	38,886	32,462	178,918	155,827	363,216	23,488	23,981	101,320	105,566	141,146							
	Subtotal:----	89,840	86,307	391,729	320,827	866,115	47,787	46,279	209,501	215,523	460,611							
VEGETABLES FR MT	ASPARAGUS, FR, CHLD	5,321	6,038	8,234	9,302	21,288	16,125	19,397	25,512	32,669	62,514							
	BROCCOLI	10,458	14,564	54,600	69,626	102,948	7,310	8,293	27,579	42,148	69,469							
	CAULIFLOWER	7,728	10,445	36,463	49,992	70,346	4,168	6,514	25,880	32,053	49,628							
	CELERY	12,574	12,092	63,465	65,380	115,257	8,150	2,980	32,348	20,480	51,058							
	LETTUCE, FR, CH.	30,361	29,201	172,851	168,524	315,002	15,772	11,368	83,312	65,985	154,873							
	ONIONS, FR	8,840	9,492	74,155	60,318	183,005	3,821	4,654	30,502	27,517	71,840							
	PEPPERS	6,139	4,563	34,505	25,354	60,961	4,270	3,900	22,515	21,605	48,485							
	Tomatoes, FR, CH.	13,981	9,477	82,795	65,282	167,332	9,165	7,226	70,585	58,561	133,834							
	OTHER VEG, FR	46,946	51,419	230,367	240,223	638,995	28,740	29,248	156,759	159,744	355,598							
	Subtotal:----	142,352	147,296	757,438	754,005	1,675,138	97,925	93,584	484,996	460,767	997,304							
VEGETABLES CANNED MT	CATSUP & CHILI SA	1,783	2,709	11,171	13,061	23,641	1,328	2,115	9,014	11,045	18,526							
	SWEET CORN CANNED	17,857	10,835	89,335	83,119	176,881	13,103	9,009	66,340	66,041	132,161							
	TOMATO PASTE	6,818	6,885	35,749	39,364	73,238	5,497	5,422	28,375	32,374	59,815							
	TOMATO SAUCE	7,465	8,982	33,735	39,564	68,893	7,046	8,753	32,635	40,370	65,694							
	OTHER CANNED VEG.	19,542	18,547	109,414	103,745	229,781	23,109	23,211	134,191	129,848	278,154							
	Subtotal:----	53,468	47,961	279,406	278,854	572,436	50,084	48,511	279,681	254,551	554,351							
FROZEN VEGETABLES MT	FROZEN FRENCH FRY	18,542	22,219	101,862	119,040	211,387	13,253	16,092	72,263	85,167	149,434							
	FZN SWT CORN	1,950	5,731	37,711	32,953	62,107	4,106	5,040	26,054	28,936	50,528							
	OTHER POT, FZN	1,836	1,815	9,346	10,355	18,656	1,598	1,373	6,730	8,488	14,968							
	OTHER FZN VEG.	1,295	4,537	27,952	26,685	60,509	5,346	4,633	26,482	25,349	57,313							
	Subtotal:----	30,624	34,304	169,873	189,133	352,660	24,165	27,140	131,521	147,941	272,244							
DEHYD VEGETABLES MT	GARLIC DEHY	698	689	3,533	3,796	7,478	1,702	8,461	9,256	18,182								
	ONIONS DEHY	2,068	2,152	15,064	13,078	23,183	5,158	4,896	26,120	29,539	53,986							
	POTATO DEHYD	2,623	3,177	15,389	19,948	34,315	2,790	3,352	14,811	20,743	35,043							
	OTHER DEHY VEG.	2,920	3,005	17,567	14,382	32,937	4,344	5,242	26,388	28,960	49,325							
	Subtotal:----	8,311	9,024	47,555	51,205	97,915	13,995	15,190	75,782	88,499	156,537							
TREE NUTS MT	ALMOND SH/PREP	13,401	14,485	93,733	90,673	161,466	43,301	69,530	309,020	421,178	565,786							
	ALMONDS, UNSHLD	1,550	942	10,470	7,073	15,878	3,678	2,439	19,860	18,714	32,772							
	PISTACHIO, UNSHLD	1,470	985	8,405	5,419	12,840	4,419	2,980	28,169	15,675	42,591							
	WALNUTS, SHLD	865	1,392	12,673	13,741	16,909	3,320	5,701	40,833	47,209	58,735							
	WALNUTS, UNSHLD	434	1,038	29,188	39,657	33,152	960	1,725	59,150	75,819	67,492							
	OTHER NUTS	4,351	4,717	31,814	35,611	57,56												

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
MAR 94

NAME		QUANTITY								VALUE (1,000 DOLLARS)													
GROUP	COMMODITY	CURR	MO	CURR	MO	YR	TODATE	YR	TODATE	CURR	MO	YR	CURR	MO	YR	TDT	YR	TDT	YR	CURR	MO	YR	LAST
FRESH FRUIT	MT																						
APPLES		10,416	8,035	36,673	25,511	119,770	3,770	3,423	12,355	11,755	1,135	4,135	11,787	11,787	11,787	1,135	12,355	11,755	70,726				
AVOCADO		63	98	16,428	6,686	16,470	90	1,138	4,135	4,135	1,135	4,135	1,135	1,135	1,135	4,135	1,135	4,135	1,135	12,355	12,355	12,355	
BANANA		317,677	313,592	1,756,502	1,717,184	3,536,585	96,014	89,097	494,925	463,714	1,004,787	463,714	1,004,787	463,714	1,004,787	463,714	1,004,787	463,714	1,004,787	463,714	1,004,787	463,714	1,004,787
CANTELOUPE		33,610	42,548	127,930	134,346	213,007	11,936	12,462	41,687	40,121	67,535	40,121	67,535	40,121	67,535	40,121	67,535	40,121	67,535	40,121	67,535	40,121	
GRAPE		92,412	77,293	241,383	212,352	325,134	64,008	56,649	173,045	162,816	261,626	162,816	261,626	162,816	261,626	162,816	261,626	162,816	261,626	162,816	261,626	162,816	
KIWIFRUIT		239	311	1,503	1,850	24,791	1,136	1,178	1,605	1,581	16,602	1,581	16,602	1,581	16,602	1,581	16,602	1,581	16,602	1,581	16,602	1,581	
MANGO		5,679	3,512	12,215	9,932	110,290	6,187	2,895	12,639	10,673	84,344	10,673	84,344	10,673	84,344	10,673	84,344	10,673	84,344	10,673	84,344	10,673	
PEACH		7,022	4,613	41,022	42,907	41,376	4,463	3,005	26,010	27,647	26,410	27,647	26,410	27,647	26,410	27,647	26,410	27,647	26,410	27,647	26,410	27,647	
PEAR		17,146	16,092	38,419	36,952	64,825	7,026	7,227	18,674	18,995	32,038	18,995	32,038	18,995	32,038	18,995	32,038	18,995	32,038	18,995	32,038	18,995	
PINEAPPLE		13,951	12,649	60,635	57,379	124,177	4,747	4,407	22,057	20,306	46,139	20,306	46,139	20,306	46,139	20,306	46,139	20,306	46,139	20,306	46,139	20,306	
STRAWBERRY		3,809	4,455	8,429	9,672	14,470	7,900	8,649	16,889	20,660	22,158	16,889	20,660	16,889	20,660	16,889	20,660	16,889	20,660	16,889	20,660	16,889	
OTHER MELON		25,732	24,611	76,651	78,715	114,510	9,623	8,992	28,398	28,965	41,350	28,398	28,965	28,398	28,965	28,398	28,965	28,398	28,965	28,398	28,965	28,398	
OTHER FRUIT		51,170	55,437	266,275	260,509	512,714	19,219	24,520	116,160	123,671	205,691	123,671	205,691	123,671	205,691	123,671	205,691	123,671	205,691	123,671	205,691	123,671	
Subtotal:----		579,233	563,252	2,684,070	2,594,001	5,220,125	235,125	221,648	980,238	935,043	1,892,412	935,043	1,892,412	935,043	1,892,412	935,043	1,892,412	935,043	1,892,412	935,043	1,892,412	935,043	
DRIED FRUIT	MT																						
DRD APRICOT		964	743	6,603	5,489	11,053	2,098	2,118	15,255	14,321	25,135	14,321	25,135	14,321	25,135	14,321	25,135	14,321	25,135	14,321	25,135	14,321	
DRD FIG & PASTE		780	1,305	6,034	6,914	8,786	930	1,434	8,634	8,737	10,808	8,737	10,808	8,737	10,808	8,737	10,808	8,737	10,808	8,737	10,808	8,737	
OTHER DRD FRUIT		1,915	2,087	15,970	13,299	25,643	2,679	2,371	17,584	18,874	36,546	18,874	36,546	18,874	36,546	18,874	36,546	18,874	36,546	18,874	36,546	18,874	
Subtotal:----		3,660	4,136	28,608	25,703	49,483	5,708	5,924	41,474	41,932	72,490	41,932	72,490	41,932	72,490	41,932	72,490	41,932	72,490	41,932	72,490	41,932	
FROZEN FRUIT	MT																						
FZN BLUEBERRIES		628	984	2,499	3,886	5,677	1,020	1,520	4,738	5,579	9,926	5,579	9,926	5,579	9,926	5,579	9,926	5,579	9,926	5,579	9,926	5,579	
FZN STRAWB.		3,687	5,222	8,530	8,680	19,937	3,700	5,439	10,040	9,392	21,071	9,392	21,071	9,392	21,071	9,392	21,071	9,392	21,071	9,392	21,071	9,392	
OTHER FZN FRUIT		3,379	3,399	12,754	16,194	32,037	3,361	4,405	13,718	18,125	34,039	18,125	34,039	18,125	34,039	18,125	34,039	18,125	34,039	18,125	34,039	18,125	
Subtotal:----		7,694	9,906	23,085	28,761	57,651	8,082	11,365	28,497	33,097	65,336	33,097	65,336	33,097	65,336	33,097	65,336	33,097	65,336	33,097	65,336	33,097	
CANNED/PREP FRUIT	MT																						
CANNED OLIVES		5,953	6,371	38,608	35,373	74,492	14,506	14,323	82,168	74,727	153,316	74,727	153,316	74,727	153,316	74,727	153,316	74,727	153,316	74,727	153,316	74,727	
CANNED ORANGES		4,059	5,600	17,571	21,970	41,806	3,790	4,144	17,335	17,335	39,502	17,335	39,502	17,335	39,502	17,335	39,502	17,335	39,502	17,335	39,502	17,335	
CANNED PEACH		1,321	1,550	16,628	13,312	23,011	852	844	11,577	7,324	15,375	7,324	15,375	7,324	15,375	7,324	15,375	7,324	15,375	7,324	15,375	7,324	
CANNED PINEAPPLE		29,928	30,919	162,280	166,277	344,866	19,765	17,626	103,506	94,107	212,896	94,107	212,896	94,107	212,896	94,107	212,896	94,107	212,896	94,107	212,896	94,107	
MIXED FRUIT		3,210	2,388	18,622	22,713	33,405	2,816	2,095	16,580	19,186	29,875	19,186	29,875	19,186	29,875	19,186	29,875	19,186	29,875	19,186	29,875	19,186	
PREP/PRES FRUIT		5,530	5,978	27,199	29,006	58,233	6,732	7,418	31,707	33,435	66,860	33,435	66,860	33,435	66,860	33,435	66,860	33,435	66,860	33,435	66,860	33,435	
OTHER CANNED FRUIT		4,319	6,011	20,726	28,365	47,278	5,598	7,914	28,630	37,464	60,772	37,464	60,772	37,464	60,772	37,464	60,772	37,464	60,772	37,464	60,772	37,464	
Subtotal:----		54,323	58,821	301,639	317,020	623,093	54,062	54,368	291,325	283,582	578,600	283,582	578,600	283,582	578,600	283,582	578,600	283,582	578,600	283,582	578,600	283,582	
FRT&VEG JUICE (SSE)	KL																						
APPLE/PEAR JU		44,553	76,268	375,831	451,529	946,807	13,278	14,973	117,608	89,248	243,582	89,248	243,582	89,248	243,582	89,248	243,582	89,248	243,582	89,248	243,582	89,248	
FCOJ		67,222	147,587	574,180	884,052	1,122,350	10,460	10,691	100,358	175,368	191,591	175,368	191,591	175,368	191,591	175,368	191,591	175,368	191,591	175,368	191,591	175,368	
GRAPE JU		15,149	29,993	74,671	28,768	148,404	5,287	5,287	10,412	10,412	52,117	10,412	52,117	10,412	52,117	10,412	52,117	10,412	52,117	10,412	52,117	10,412	
PINAP JU		28,453	22,069	163,138	155,564	339,270	6,440	4,944	38,860	34,858	77,767	38,860	77,767	38,860	77,767	38,860	77,767	38,860	77,767	38,860	77,767	38,860	
OTHER FRUIT JU		16,226	13,496	66,526	82,138	143,384	8,922	9,443	36,354	48,243	77,530	48,243	77,530	48,243	77,530	48,243	77,530	48,243	77,530	48,243	77,530	48,243	
Subtotal:----		171,605	262,416	1,254,350	1,602,053	2,706,217	44,389	61,524	320,210	358,210	642,599	358,210	642,599	358,210	642,599	358,210	642,599	358,210	642,599	358,210	642,599	358,210	
FRESH VEGETABLES	MT																						
GARLIC		1,826	2,968	4,912	29,183	29,171	2,206	2,870	5,646	11,886	23,144	11,886	23,144	11,886	23,144	11,886	23,144	11,886	23,144	11,886	23,144	11,886	
ASPARAGUS		5,946	5,984	22,643	19,827	29,852	7,916	9,995	31,893	31,213	39,243	31,213	39,243	31,213	39,243	31,213	39,243	31,213	39,243	31,213	39,243	31,213	
BELL PEPPER		20,716	23,090	89,180	89,276	121,859	14,264	22,531	72,836	91,609	129,247	91,609	129,247	91,609	129,247	91,609	129,247	91,609	129,247	91,609	129,247	91,609	
CARROTS		3,071	3,932	36,639	41,155	51,431	1,077	1,197	9,897	9,897	14,966	9,897	14,966	9,897	14,966	9,897	14,966	9,897	14,966	9,897	14,966	9,897	
CHILI PEPPER		3,907	6,702	20,224	22,720	36,933	4,293	4,456	27,403	24,395	48,709	24,395	48,709	24,395	48,709	24,395	48,709	24,395	48,709	24,395	48,709	24,395	
CUCUMBER		36,772	38,911</td																				

Export News and Opportunities

Exports of U.S. almonds to Greece are rising sharply.

Exports of U.S. almonds to Greece during the first six months of marketing year 1993/94 (September-August) were about 400 metric tons (MT), more than double the amount shipped in the first half of last marketing year. The 1993 Greek almond crop, although above normal, was not sufficient to supply the domestic demand for snack food, confectionary industry needs, and export contracts. Major Greek tree nut traders offered immediate cash payment to almond producers, purchasing most of the 1993 almond crop before harvest. As a result, smaller Greek firms were unable to purchase domestic almonds to satisfy their obligations. Given the current

shortage of almonds, another 400 to 600 tons of U.S. almonds will be needed to cover Greek demand until new crop production begins in September, 1994.

GSM-102 applications for hops to Mexico continue to rise.

Since last month's report, U.S. hops exporters have applied for \$400,000 of coverage under the GSM-102 credit guarantee program. The additional registrations boosts the total amount of coverage to \$3.2 million this year. Apart from this, there was no other horticultural activity under the progam during the reporting period.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 (\$1,000)	Exporter Applications Approved (\$1,000)	Balance (\$1,000)
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	1,000	0	1,000
Hops	6,500	3,200	
3,300			
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Turkey			
Potatoes 3/	5,000	0	5,000
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through May 06, 1994.

2/ Apples, pears, plums, peaches, nectarines, and strawberries.

3/ Cut for french fries.

4/ Apples, pears, plums, grapes, cherries, and peaches.

World Trade Situation and Policy Updates

French prune exporters target Italy for market promotion.

SOPEXA, the French dried prune promotion board, recently launched a major marketing initiative directed at Italian consumers and the trade. According to research produced by SOPEXA, the best way to market French prunes is to target consumers (mostly women) who purchase in supermarkets. The research showed that prunes should be presented as a healthy snack, but with more emphasis on the family, sports and snack aspects and less emphasis on the actual nutritional value. It also showed that Italian consumers were not yet ready for using dried prunes in recipes. Also, too much emphasis on the health aspects might lead Italian consumers to believe that prunes were more of a medicine (that should be marketed in pharmacies) than a food for everyday consumption.

The trade is also being targeted in this promotion. One aspect of this effort is to highlight the reliability of supply consistent French production provides. Brochures developed by SOPEXA state that over 33 percent of French prunes are exported, and that Italy is the second largest export market, after the Netherlands.

Brazil's orange juice exports in 1994/95 forecast to increase slightly from the previous year.

The USDA forecast for Sao Paulo's 1994/95 orange crop is 300 million boxes, 1 percent below the 1993/94 output. A slight reduction is expected in orange yields per tree, due to reduced grove care and some blossom blight problems. Sao Paulo's oranges for processing in 1994/95 are forecast to drop slightly to 245 million boxes, while fresh domestic consumption and exports are estimated unchanged from last season.

Brazil's orange juice production in 1994/95 is forecast to decrease 1 percent to 1.025 million metric tons (MT) 65 degrees brix, based on the expected smaller Sao Paulo orange crop and lower juice yields. Brazil's frozen concentrated orange juice (FCOJ) exports in 1994/95 are forecast at 1.025 million tons, 65 degrees brix, slightly above the 1993/94 forecast. Expanded exports to Europe and Japan are expected to more than offset likely lower shipments to the United States.

Mexican orange juice exports continue to increase.

USDA has increased its estimate of Mexico's calendar year 1993 orange juice production from 22,000 to 30,000 tons as exports increased due to more favorable international prices. Processors also built up stocks in anticipation of more favorable access to the U.S. market in 1994 under NAFTA. The 1993 ending stock estimate for orange juice was revised upward from 0 to 9,000 tons. Mexico's 1993 orange juice export estimate was increased from 20,000 to 24,000 tons.

Mexico's orange juice exports in 1994 are forecast to increase by 16 percent to 28,000 tons with nearly all shipments likely going to the United States. This year Mexico will receive access to the United States market for 40 million gallons (equivalent to 28,451 metric tons, 65 degrees brix) of frozen concentrate orange juice (single strength equivalent) at one-half of the Most Favored Nation (MFN) rate. Any FCOJ imports above the quota will enter the United States at the MFN rate.

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/

	1991	1992	1993	1994
Oranges, Sao Paulo	Million Boxes 2/			
Production 3/	250	314	302	300
Fresh Consumption	35	38	53	53
Fresh Exports	3	2	2	2
Processed	212	274	247	245
FCOJ, Brazil	1,000 Metric Tons, 65 Degrees Brix 4/			
Beginning Stocks	126	68	105	107
Production				
Sao Paulo	920	1,100	1,020	980
Other	29	45	20	45
Total	949	1,145	1,040	1,025
Exports 5/				
Sao Paulo	960	1,045	1,000	980
Other	29	45	20	45
Total	989	1,090	1,020	1,025
Consumption	18	18	18	20
Ending Stocks	68	105	107	87
FCOJ Yields (kg/Box)	4.34	4.01	4.13	4.01

- 1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.
 2/ 40.8 kg. or 90 pounds
 3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.
 4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.
 5/ Includes tangerine juice.

PRODUCTION AND TRADE OF FRESH CUT FLOWERS IN SELECTED COUNTRIES

U.S. exports of cut flowers and nursery products in 1993, valued at \$209 million, rose 4 percent from 1992. Canada, the European Union, and Mexico accounted for about 90 percent of the total export value. Cut flowers valued at \$39 million, were up 22 percent; while exports of nursery products, consisting of trees, shrubs, bushes, plants, bulbs, etc., valued at \$170 million, were up only slightly. However, cut flower imports have made serious inroads into the U.S. market. U.S. flower imports reached an all-time high in 1993 with a value of \$382 million, up 8 percent from 1992. Colombian flowers continue to account for the lion's share of U.S. flower imports.

United States

There are probably more than 200 different types of fresh cut flowers produced and sold in the United States. Roses, carnations, pompon and standard chrysanthemums, gladiolus (spikes), and orchids (*cattleya* and *cybidium*) are commercially the most important.

Most fresh cut flowers (carnations and roses) in the United States are produced the year round under, and protected by a structure of some sort. The structure may be a greenhouse where the environment is carefully controlled or an overhead structure that provides shade or protection from the wind. Fresh cut flowers that are not grown under greenhouse or other type of

structure are referred to as field flowers. These flowers include gladiolus, daisies, statice, snapdragons, etc.

In calendar year 1993, production of roses, carnations, chrysanthemums, and gladioli (spikes) in the United States totaled 1.1 billion stems, down 8 percent from the level registered in 1992. This decline was due primarily to reduced acreage, weather factors, and import competition.

Official U.S. Department of Agriculture production (commercial only) statistics, available only for selected varieties of fresh cut flowers, are based on the actual numbers of flowers sold in 28 states prior to 1992, and 36 states beginning in 1992.

**U.S. Production of Selected Fresh Cut Flowers, Calendar Years
(1,000 blooms)**

Flowers	1991	1992	1993
Roses, hybrid tea	447,797	458,974	430,819
Roses, sweetheart	88,748	74,588	80,430
Carnations, standard	197,580	213,599	204,926
Carnations, miniature	133,956	116,472	112,536
Chrysanth., stand.	22,138	19,775	20,944
Chrysanth., pompon	124,488	92,616	68,298
Gladioli (1,000 spikes)	165,510	187,643	162,057
Total	1,180,217	1,163,667	1,080,010

Source: National Agricultural Statistical Service, USDA.

Imports of fresh cut flowers continue to make serious inroads into the U.S. cut flower market. The import share of U.S. supply in 1993 for carnations, roses, and chrysanthemums averaged 84, 58, and 88 percent, respectively compared with 73, 42, and 72 percent, respectively, in 1989.

In 1993, imports of all fresh cut flowers into the United States reached an all-time high of 4.4 billion blooms valued at \$382 million, up 11 percent in volume and up 8 percent in value from the levels registered in 1992. The increase in volume is attributed mainly to larger imports of standard and miniature carnations, roses, and pompon chrysanthemums. Colombian flowers continue to account for the lion's share of U.S. imports. Colombian flowers in 1993 accounted for 71 percent of quantity of roses, 97 percent of the standard carnations, 94 percent of the miniature carnations, 88 percent of the pompons, and 76 percent of the mums sold in the United States. Other important suppliers include Mexico, Ecuador, Costa Rica, Guatemala, and the Netherlands.

Fresh cut flower sales to consumers in the United States traditionally have been made by retail florists for use in weddings, funerals, get-well gifts, special occasions such as Mother's Day, etc. In recent years, there has been a large increase in sales of fresh cut flowers through mass marketers such as supermarkets, garden stores, flower stands and street vendors. The retail florist and the mass marketer use domestic and/or foreign produced fresh cut flowers depending on price, availability, and quality. Reportedly, Americans buy only half as many cut flowers as the Japanese and Italians, and a third as many as the Swiss.

U.S. exports of nursery products and cut flowers in 1993 were valued at \$209 million, up 4 percent from 1992. Exports of nursery products consisting of trees, tree parts, shrubs, bushes, herbaceous plants, nursery stock, bulbs and corms, etc., were valued at \$170 million. Canada, the European Union, and Mexico accounted for 90 percent of the total value. Other important but smaller markets, including Japan, the Caribbean, other western Europe, the Middle East, and Guatemala accounted for the

balance of U.S. nursery product exports. Exports of cut flowers, mostly of roses and carnations, valued at \$39 million, were up 22 percent from 1992.

On February 14, 1994, the U.S. Floral Trade Council, with the support of Roses Incorporated, filed an anti-dumping petition with the International Trade Administration (ITA), U.S. Department of Commerce, and the International Trade Commission (ITC) concerning fresh cut roses from Colombia and Ecuador.

On March 28, 1994, the U.S. International Trade Commission voted in a preliminary ruling that fresh cut roses allegedly dumped here by Colombia and Ecuador are a threat to U.S. industry, opening the way to an investigation by the ITA.

Colombia

Production of fresh cut flowers in Colombia in 1994 is forecast at 144,000 metric tons on 4,304 hectares. Greenhouses account for about 99 percent of the total area devoted to flower production, while open field production accounts for the balance. Greenhouses are constructed of plastic. About 89 percent of Colombia's greenhouses remain on the outskirts of Bogota, with 7 percent near Medellin, and 4 percent in the Cali area. Nearly all of the carnations, roses, alstroemerias, and gypsophila are grown near Bogota. Open field production accounts for only about 1 percent of the total flower area.

Cut flowers in Colombia are produced on about 460 farms and sold by about 300 exporters. The floriculture industry in Colombia employs about 80,000 in direct jobs, which are about 75 percent women, and another 50,000 indirect jobs.

Colombia: Cut Flowers Area, Production and Exports Calendar Years

Items	1990	1991	1992	1993*	1994*
Hectares					
Area	3,914	4,111	4,242	4,173	4,304
Greenhouse	3,875	4,070	4,200	4,130	4,260
Open	39	41	42	43	44
Metric tons					
Production	96,992	101,537	112,209	131,188	144,211
Carnation, min.	0	0	10,140	13,824	15,789
Carnation, std.	44,354	45,439	40,799	49,385	51,789
Chrysant., std.	3,175	3,404	2,604	2,660	2,632
Chrysant., pom.	24,277	25,137	23,868	23,684	24,211
Roses	14,493	15,831	19,649	23,499	27,368
Orchids	10,693	11,726	15,148	18,136	22,632
Exports	92,142	96,460	106,599	124,629	137,000
Carnation, min.	0	0	9,633	13,133	15,000
Carnation, std.	42,136	43,167	38,759	46,916	49,000
Chrysant., std.	3,016	3,234	2,474	2,527	2,500
Chrysant., pom.	23,063	23,880	22,675	22,500	23,000
Roses	13,768	15,039	18,667	22,324	26,000
Orchids	87	128	0	0	0
Others	10,072	11,012	14,391	17,229	21,500
Value (U.S.\$1,000)					
Total Exports	221,340	228,886	280,319	340,896	375,000

* Estimate. Note: Totals are shown in bold print.

Source: Flower Growers Association (ASOCOLFLORES), DANE (National Statistics Bureau), and U.S. Agricultural Attaché, Bogota.

Colombian flower growers are diversifying their production capabilities by establishing operations in Ecuador, Costa Rica, and Mexico. However, the largest perceived threat to the Colombian domination of the North American cut flower market is foreign investment in production facilities in Mexico, largely due to the U.S.-Mexico free trade agreement. In 1993, Mexico was the fourth largest flower exporter to the United States. During the same year, the Netherlands and Ecuador ranked as the second and third suppliers, respectively.

Farm-made bouquets are reportedly becoming very popular with the Colombian floriculture

industry. Colombian farm-made bouquets are made of an assortment of flower blooms consisting of pompon chrysanthemums, miniature carnations, and gypsophilas. These bouquets are made primarily for the export market.

Colombia began exporting flowers in 1964, and now flowers are the third most important agricultural export, after coffee and bananas. In 1994, the value of total flower exports is forecast at U.S.\$375 million, up 10 percent from last year. About 85 percent of Colombia's total cut flower production is earmarked for export, with about 80 percent going to the United

States. Germany and the United Kingdom take almost all of the remaining flower shipments.

Since 1967, flower exports to countries other than the United States receive a 5 percent Cert (income tax rebate certificate). Certs for flower exports to the United States were dropped several years ago to avoid countervailing action by the United States.

There are two flower producer associations in Colombia, ASOCOLFLORES and FEDEFLORES. ASOCOLFLORES, the older and larger of the two, represents mostly owners with large operations, while FEDEFLORES represents mostly owners with small or medium-sized flower operations.

In 1988, the Animal and Plant Health Inspection Service of the U.S. Department of Agriculture discovered white rust--a disease that attacks chrysanthemums--in a shipment of Colombian flowers arriving in Miami. However, since that time the Colombian Government has implemented a strict and comprehensive farm surveillance program, which includes monitoring for the disease on a plant-by-plant basis.

Netherlands

The Netherlands is the world's largest producer of fresh cut flowers. In 1993, total area devoted to cut flowers, potted plants, and other plants totaled 7,699 hectares of which 5,377 hectares were grown under glass greenhouses. Area devoted to hothouse (greenhouse) production of cut flowers in 1993 totaled 3,638 hectares, up slightly from 1992. Potted plant area during this same period totaled 1,078 hectares. The area devoted to the production of ornamental plants in 1993 on artificial growing medium (without soil) totaled 765 hectares, up 17 percent from 1992.

In the Netherlands, the Aalsmeer flower market, a cooperative of about 5,000 flower growers, is the largest flower auction site in the world. Reportedly, flower products are shipped to Aalsmeer from some of the world's largest flower producers for assessment by the auction's 2,500 buyers, and sold around the world. In 1993, more than 800 types of cut flowers and plants passed through the Aalsmeer auction.

Some of the auction's most important supply of cut flowers (Dutch product) in 1993 included: Alstroemerias, anthuriums, asters, carnations, mums, pompons, cymbidium orchids, daffodils, freesias, gerberas, iris, lilies, roses, tulips, limoniums, tracheliums, nerines, bouvardias, anemonies, aconitums, hyacinths, and others.

The value of cut flowers exported from the Netherlands in 1993 reached a record of U.S.\$2.2 billion, up 8 percent from 1992. A breakdown of flowers by type is not available. According to the Dutch Product Board for Ornamental Products, Dutch exports of cut flowers and potted plants will continue to grow, reaching a projected value of U.S.\$4.0 billion by the year 2000. Most of the increase in production is expected to be sold in markets such as the EU, the United States, and Japan. Eastern European markets are foreseen as having a large growth potential.

Costa Rica

Exports of fresh cut flowers and ferns from Costa Rica in 1993 combined for a total value of U.S.\$47.3 million. Cut flowers and ferns remain the third most important agricultural export category behind bananas and coffee. Export of flowers and ferns during the first four months of 1994 registered increases of 14 percent and 31 percent, respectively, from the same period a year earlier.

Historically, the United States accounts for the bulk of Costa Rican flower exports. In 1992, exports of cut flowers from Costa Rica to the United States were valued at about U.S.\$12 million (84 percent of the total export value), followed by Canada with U.S.\$0.8 million, Germany with U.S.\$0.7 million, and the Netherlands with U.S.\$0.4 million. Over 90 percent of the flowers exported are chrysanthemums, followed by smaller quantities of roses and other flowers. Carnations are no longer produced for export.

The main market for Costa Rican ferns is the European Union (EU). In 1992, ferns exported from Costa Rica were valued at U.S.\$23.7 with the EU accounting for 92 percent of the total value. Exports to Germany were valued at U.S.\$11.8 million, followed by Holland with

U.S.\$9.0 million, and the United Kingdom and Italy combined with less than U.S.\$1.0 million.

Most of the flowers and ferns in Costa Rica are grown in the Central Valley provinces of San Jose, Alajuela, Heredia, Cartago, and Fraijanes where the climate is ideal for floricultural production year round. The lower areas of the valley provinces provide the best growing conditions for flower production. All tropical flowers and ornamental plants are grown in open fields on about 400 hectares. Production of cut flowers by type in Costa Rica is not available. According to ACOLFLOR (Costa Rican Association of Flower Producers), total area planted to cut flowers, excluding tropical and ornamental plants, is estimated at about 100 hectares, all under greenhouses.

Total area planted to ferns (leather leaf) is estimated at about 1,000 hectares, all under plastic covering. There are approximately 40 fern growers in Costa Rica, with about 5 companies controlling the largest share of the export market. Many independent growers sell their product to larger companies for export. Ferns are exported by air and sea.

According to ACOLFLOR, the main obstacle that faces Costa Rican flower and fern exporters is the lack of adequate infrastructure, and improper handling of flowers at Costa Rica's international airport.

Israel

Commercial production of cut flowers in Israel consists mostly of roses, carnations, and chrysanthemums. In 1993, production of these flowers totaled 500 million stems, up 13 percent from 1992.

Despite the serious crisis in Israel's agriculture and the reshuffling of priorities, the flower sector is looked upon as having expansion possibilities. Currently there is some government assistance for the construction of greenhouses and for research into the development of new flower varieties.

In 1993, roses and carnations accounted for 95 percent of Israel's flower exports which totaled 379 million stems. The European Union, mainly Holland, Germany, and the United Kingdom accounted for approximately 87 percent of Israel's total flower exports in 1993. Israeli flowers shipped to the EU are marketed mostly through flower auctions. Auction buyers purchase these flowers and sell them to other countries in Europe and elsewhere.

Ecuador

Ecuador's cut flower production and exports have grown rapidly over the last five years. Reportedly, the industry has received investment capital from other countries, i.e., Colombia, Peru and others, and Ecuador's flower production has flourished. The flower industry in Ecuador has diversified from producing mainly roses, carnations, and chrysanthemums into producing gypsophilia's, pompon chrysanthemums, statices and other flowers.

In 1994, production of cut flowers in Ecuador is forecast at 19,300 metric tons on 598 hectares. About 74 percent of the total flower area was under greenhouses, and the balance in open fields. Traditionally, over 90 percent of Ecuador's total cut flower production is earmarked for export. The U.S. continues to be Ecuador's primary market for flower exports.

Ecuador: Production of Cut Flowers Metric tons

Flowers	1991	1992*	1993*	1994*
Roses	5,139	5,667	7,305	9,430
Chrysanthemum, stand.	191	516	605	855
Chrysanthemum, pom.	641	390	502	646
Carnations	851	868	1,119	1,440
Statices	512	690	888	1,144
Gypsophila	1,938	2,256	2,900	3,738
Others	1,170	1,449	1,881	847
Total	10,442	11,836	15,200	19,300

Source: Ecuador's Cut Flower Exporters and Growers Association. * Estimate.

Note: One metric ton of fresh cut flowers is equivalent to about 59 boxes of 17 kilograms each.

There is little price information available on the sale of flowers from Ecuador, but most are sold on consignment. Trade sources believe that the Andean Trade Preference Act (ATPA), which grants duty-free access to the U.S. market to 5 Andean countries, will benefit Ecuador's industry substantially.

Exports of cut flowers from Ecuador in 1994 are forecast to reach 19,000 tons, up 30 percent from 1993. Roses, carnations, chrysanthemums, and gypsophilas are expected to account for bulk of total export volume.

Bolivia

Commercial production of fresh cut flowers in Bolivia includes mostly roses, carnations, and chrysanthemums. Production statistics are not available for other varieties of cut flowers.

In 1992, production of roses and carnations totaled 37.3 million stems on 16.5 hectares and 6 hectares, respectively. Production of roses and carnations were under greenhouses. Cut flowers produced in open fields are mainly for the domestic market.

The volume of exports by type of fresh cut flowers and country of destination is not available. In 1992, Bolivia exported 4 million stems of cut flowers, about the same volume that was exported the year before. Approximately 50 percent of Bolivia's cut flower exports are shipped to the United States, with the rest going to Chile, Paraguay, Brazil, and Argentina.

Bolivia: Fresh Cut Flower Production (1,000 stems)

Flowers	1989	1990	1991	1992
Roses	11,157	13,054	15,403	18,480
Carnations	6,658	10,653	14,914	18,810
Chrysanthemums	108	na	na	na

Source: U.S. Agricultural Attaché. na = not available.

Peru

Commercial production of cut flowers in Peru is small. In 1992, cut flowers produced for export, mainly baby's breath (gypsophila) and carnations, were valued at only U.S.\$2 million, compared to U.S.\$4 million in 1988. The United States, Germany, and the Netherlands were the principal markets.

The Peruvian cut flower industry reportedly has suffered heavy physical and financial losses due to terrorist violence. This situation has caused many of the small flower growers to close their operations, and move to nearby cities in an effort to avoid attacks and extortion threats. Traditionally, small farmers have supplied a large part of the flower volume exported by large firms.

In order to avoid further deterioration of the flower industry in Peru, most flower exporters have implemented strategies to diversify their production lines into other more profitable crops. According to Peru's Flower Growers Association there are only three flower exporting firms that remain in business in Peru.

Trade sources report that the industry's depressed situation is a result of poor economic conditions, high interest rates, the elimination of government export incentives, high cost of production, and terrorist attacks. As a result, some flower growers and exporters have moved their operations to Ecuador, Colombia, and Costa Rica.

(Emanuel McNeil, 202-720-2083)

Carnations: U.S. Production, Imports, Percent Imports of Supply, Growers

Type and Year	Production 1/ 1,000 stems	Imports 1,000 stems	Import Value in \$1,000	Imports as a Percent of Supply	Total Number of Growers
Miniature 2/					
1988	158,748	281,004	12,099	64	204
1989	150,492	283,860	16,312	65	217
1990	140,796	321,924	16,120	70	156
1991	133,956	373,536	23,121	74	134
1992	116,472	384,276	23,448	77	123
1993	112,536	439,464	22,737	80	115
Standard					
1988	292,409	932,756	52,848	76	244
1989	248,661	812,028	56,592	77	256
1990	223,956	1,060,354	50,811	83	172
1991	197,580	1,027,929	48,726	84	149
1992	213,599	1,153,855	62,660	84	139
1993	204,926	1,252,734	62,347	86	119
Total					
1988	451,157	1,213,760	64,947	73	na
1989	399,153	1,095,888	72,904	73	na
1990	364,752	1,382,278	66,931	79	na
1991	331,536	1,401,465	71,847	81	na
1992	330,071	1,538,131	86,108	82	na
1993	317,462	1,692,198	85,084	84	na

1/ Production statistics are based on actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial production only.

2/ Revised from bunches to stems (12 stems = one bunch). na = not available.

Source: Inspections by Plant Protection and Quarantine Offices, USDA, as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, USDA, and the U.S. Department of Commerce, Bureau of the Census.

**Chrysanthemums: U.S. Production, Imports,
Percent Imports of Supply, Growers**

Type and Year	Production 1/ 1,000 stems	Imports 1,000 stems	Import Value in \$1,000	Imports as a Percent of Supply	Total Number of Growers
Pompon 2/					
1988	180,126	508,230	50,888	74	552
1989	137,514	427,128	42,716	76	482
1990	115,962	524,034	46,337	82	441
1991	124,488	552,546	46,331	82	175
1992	92,616	562,470	54,336	86	152
1993	68,298	611,520	54,795	90	139
Standard					
1988	44,108	25,762	4,773	37	435
1989	39,275	27,978	5,387	42	401
1990	19,003	32,497	7,524	56	381
1991	22,138	32,849	8,878	60	120
1992	19,775	33,826	7,962	63	152
1993	20,944	29,570	14,396	58	139
Total					
1988	224,234	533,992	55,661	70	na
1989	176,789	455,106	48,103	72	na
1990	134,964	556,531	53,861	82	na
1991	146,626	585,395	55,209	80	na
1992	112,391	596,296	62,298	84	na
1993	89,242	641,090	69,191	88	na

1/ Production statistics are based on actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial production only.

2/ Revised from bunches to stems (one bunch = 6 stems).

na = not available.

Source: Inspections by Plant Protection and Quarantine Offices, USDA as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, and the U.S. Department of Commerce, Bureau of the Census.

Roses: U.S. Production, Imports, Percent Imports of Supply, Growers

Type and Year	Production 1,000 stems	Imports 1,000 stems	Import Value in \$1,000	Imports as a Percent of Supply	Total Number of Growers
Sweetheart 2/					
1988	124,813	3/	243	na	201
1989	106,319	3/	6,472	na	197
1990	101,564	3/	3,386	na	153
1991	88,748	3/	2,218	na	146
1992	74,588	3/	560	na	133
1993	80,430	3/	770	na	126
Hybrid Tea					
1988	440,627	3/	62,512	na	273
1989	328,585	3/	68,840	na	287
1990	399,874	3/	82,652	na	221
1991	447,797	3/	89,476	na	219
1992	458,974	3/	89,882	na	224
1993	430,819	3/	106,622	na	213
Total					
1988	565,440	286,758	62,755	34	na
1989	434,904	314,195	75,312	42	na
1990	501,438	427,328	86,038	46	na
1991	536,545	502,007	91,694	48	na
1992	533,562	571,703	90,442	52	na
1993	511,249	694,583	107,392	58	na

1/ Production statistics are based on the actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial growers only.

3/ U.S. imports of roses provided by the Market News Service are only available by total and not by type.

na = not available.

Source: Inspections by Plant Protection and Quarantine Offices, USDA as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, and the U.S. Department of Commerce, Bureau of the Census.

Cut Flowers: U.S. Imports by Country of Origin, Calendar Years 1989-93
1,000 stems

Type and Country	1989	1990	1991	1992	1993
Carnations	812,028	1,060,354	1,027,929	1,153,855	1,252,734
Colombia	766,530	1,015,760	988,135	1,115,375	1,213,506
Ecuador	11,670	14,075	14,164	14,926	18,487
Guatemala	603	5,905	5,601	6,950	4,759
Mexico	18,493	13,820	12,285	10,457	11,262
Netherlands	2,609	2,219	2,337	3,476	2,158
Peru	6,397	3,481	2,484	203	347
Others	5,726	5,094	2,923	2,468	2,215
Carnat., Minia.1/	283,860	321,924	373,536	384,276	439,464
Colombia	225,276	257,388	295,248	339,888	411,324
Costa Rica	9,912	4,596	3,948	948	0
Ecuador	16,944	21,192	21,804	11,844	11,052
Mexico	10,452	6,000	6,564	9,864	10,632
Peru	9,768	22,212	24,744	18,252	4,632
Israel	0	0	17,664	0	0
Others	11,508	10,536	3,564	3,480	1,824
Chrysanthemums	27,978	32,497	33,172	33,826	29,570
Colombia	19,150	25,493	27,054	27,630	22,512
Dominican Rep.	313	813	740	492	441
Ecuador	3,006	2,062	2,237	2,752	3,167
Netherlands	3,963	3,550	2,849	2,641	2,658
Others	1,415	199	292	311	762
Chrysth., Pom 3/	427,128	524,034	552,546	562,470	611,520
Colombia	369,114	455,124	478,614	493,182	537,306
Costa Rica	39,552	51,672	59,016	60,702	65,082
Dominican Rep.	5,022	3,930	2,136	672	na
Ecuador	9,696	10,206	8,598	7,062	6,870
Others	3,744	3,102	4,182	852	2,262
Roses	314,195	427,328	502,007	571,703	694,583
Bolivia	1,706	2,362	3,350	3,024	2,199
Colombia	221,593	293,171	350,441	398,204	490,192
Costa Rica	4,074	5,447	7,604	7,348	6,325
Dominican Rep.	2,351	3,412	3,364	3,428	3,168
Ecuador	26,238	42,283	57,956	82,828	113,097
Guatemala	9,365	16,543	23,533	27,885	29,935
Mexico	33,565	47,969	43,005	35,580	35,420
Netherlands	11,606	12,852	10,280	11,879	11,240
Others	3,697	3,289	2,474	1,527	3,007

--Cut Flowers Cont'd--

	1989	1990	1991	1992	1993
Alstroemeria	69,088	80,168	83,343	92,164	104,989
Colombia	64,209	75,726	80,054	89,203	101,598
Netherlands	3,171	3,130	2,499	2,373	2,310
Others	1,708	1,312	790	588	1,081
Chamaedorea 2/	320,150	332,825	399,725	443,775	385,925
Guatemala	63,925	55,075	60,075	61,400	62,300
Mexico	254,175	274,650	336,775	381,525	323,050
Others	2,050	3,100	2,875	850	575
Daisies	25,575	19,048	19,848	4,766	8,196
Colombia	1,062	454	822	na	na
Mexico	24,418	18,509	19,001	4,545	8,101
Others	95	85	25	221	95
Freesia	30,716	28,974	23,528	25,353	27,700
Colombia	1,787	1,317	1,388	1,560	2,207
Netherlands	28,573	27,517	22,066	23,627	25,215
Others	356	140	74	166	278
Gerbera	30,266	31,510	32,350	34,807	37,679
Colombia	19,565	23,017	26,106	28,662	28,544
Costa Rica	1,228	484	409	415	344
Dominican Rep.	1,547	1,295	1,061	821	763
Israel	989	852	841	895	1,598
Netherlands	5,193	5,066	3,507	3,679	5,855
Others	1,744	796	426	335	597
Gladioli	3,730	4,960	4,158	5,029	4,701
Mexico	1,263	2,562	2,505	3,210	3,090
Netherlands	2,066	1,880	1,473	1,638	1,401
Others	401	518	180	181	210
Gypsophila 4/	70,950	90,570	114,310	151,840	180,060
Colombia	25,320	33,750	47,060	56,470	65,390
Ecuador	24,300	35,010	45,280	61,590	93,190
Peru	7,850	13,730	14,740	13,550	9,860
Others	13,470	8,080	7,230	10,450	11,620
Iris	29,038	27,070	20,813	21,366	20,956
Colombia	171	658	103	162	na
Netherlands	28,323	26,083	20,460	21,067	20,555
Others	397	329	250	137	401
Leatherleaf	445	3,254	32,225	19,074	10,798
Costa Rica	0	3,044	31,441	17,826	8,831
Others	445	210	784	1,248	1,967

--Cut Flowers Cont'd--

	1989	1990	1991	1992	1993
Lilac	210	316	619	710	691
Netherlands	208	316	617	709	678
Others	2	0	2	1	13
Lilies	34,381	38,120	32,149	35,081	35,966
Colombia	4,229	2,395	2,105	2,343	2,076
Costa Rica	717	944	1,692	2,933	3,198
Netherlands	27,845	33,811	27,589	28,513	27,326
Others	1,530	970	763	1,292	3,366
Misc. Greens	5,657	9,521	23,309	24,075	36,885
Costa Rica	1,839	6,326	7,860	9,231	11,670
Israel	766	na	5,400	3,353	2,446
Italy	na	561	3,928	4,016	4,107
Jamaica	na	52	320	542	463
Mexico	10	431	3,253	5,675	16,114
Thailand	325	309	319	401	254
Others	2,727	1,842	2,229	857	1,831
Orchids, Cybidiums	3,271	5,034	4,503	5,979	4,653
Australia	185	248	na	na	na
Netherlands	2,250	4,077	3,211	3,495	3,037
New Zealand	676	699	702	1,209	1,511
Others	160	10	590	1,275	105
Orchids, Other	21,058	24,419	22,413	14,094	23,341
Netherlands	467	162	283	290	331
Singapore	730	509	160	na	na
Thailand	19,766	23,691	21,889	13,493	22,599
Others	95	57	81	311	411
Statice 5/	68,470	73,790	86,940	75,140	114,380
Colombia	27,200	28,500	38,490	32,340	42,300
Ecuador	11,510	14,700	12,740	12,110	10,930
Mexico	19,340	23,530	27,930	24,770	54,370
Peru	5,820	4,190	4,400	720	1,720
Others	4,600	2,870	3,360	5,200	4,140
Tulips	68,478	71,234	52,054	60,519	57,842
France	2,768	2,369	1,421	1,257	2,193
Netherlands	65,503	68,019	50,249	58,995	55,411
Others	207	846	384	267	238

--Cut Flowers Cont'd--

	1989	1990	1991	1992	1993
Other Ornament.	199,044	257,402	270,670	251,510	319,774
Colombia	56,482	88,229	108,050	118,355	156,551
Costa Rica	18,362	28,031	31,895	28,535	36,043
Dominican Rep.	3,608	12,585	23,536	11,016	15,739
Ecuador	4,076	8,169	10,678	11,724	17,853
Guatemala	3,102	4,830	3,681	5,054	4,401
Honduras	1,678	4,405	3,133	2,784	2,982
Jamaica	2,966	5,684	5,319	4,026	2,492
Mexico	12,225	13,984	14,511	16,184	21,385
Netherlands	43,576	37,987	30,449	28,796	32,413
Peru	16,012	18,453	14,014	2,576	1,860
Others	36,957	35,045	25,404	22,460	28,055
All Total Stems	2,845,716	3,464,352	3,712,147	3,971,412	4,402,407

Note: Totals are shown in bold print. 1/ Revised from bunches to stems (one bunch = 12 stems).
 2/ Revised from bunches to stems (one bunch = 25 stems). 3/ Revised from bunches to stems (one bunch = 6 stems). 4/ Revised from bunches to stems (one bunch = 10 stems). 5/ Revised from bunches to stems (one bunch = 10 stems).

Source: Inspections by Plant Protection and Quarantine Offices, USDA as reported by the Federal-State Market News Service.

**U.S. Imports Of Fresh Cut Flowers
(\$1,000 dollars)**

Origin	1989	1990	1991	1992	1993
Colombia	186,595	199,139	202,877	231,397	251,837
Netherlands	67,660	63,371	49,439	51,080	53,460
Mexico	9,978	13,438	15,390	11,898	13,930
Costa Rica	8,824	9,195	10,180	10,029	11,639
Ecuador	7,222	9,597	12,442	15,244	19,575
Peru	4,181	3,624	3,648	2,316	1,082
Thailand	4,017	4,017	4,506	4,378	4,275
Canada	3,759	3,830	3,783	4,133	4,584
Israel	3,196	1,967	2,056	1,610	1,828
Guatemala	2,591	3,316	3,699	5,335	5,033
Australia	945	1,559	2,078	2,898	2,614
France	2,828	2,957	2,431	2,253	2,047
Italy	1,591	1,245	1,029	1,332	1,128
Dominican Rep.	634	801	1,341	1,639	1,872
Taiwan	2,491	826	209	227	109
Jamaica	956	1,230	881	597	160
Others	8,186	6,134	6,027	6,000	7,009
Total	315,654	326,246	322,016	352,366	382,182

Source: U.S. Department of Commerce, Bureau of the Census.

U.S. Exports of Fresh Cut Flowers and Nursery Products
(\$1,000)

Origin	1989	1990	1991	1992	1993
Cut Flowers:					
Canada	2,200	17,437	15,757	17,479	19,259
Japan	2,672	4,349	4,874	4,974	6,564
Mexico	556	906	4,235	2,897	4,764
Netherlands	1,257	2,453	3,393	1,861	2,606
Germany	1,586	2,362	2,090	1,713	2,548
United Kingdom	332	341	587	646	849
Switzerland	496	512	544	673	651
Venezuela	0	37	71	342	508
Others	1,674	1,147	2,148	1,920	1,351
Total	10,773	29,544	33,699	32,505	39,100
Nursery Products:					
Canada	33,557	92,371	88,541	85,911	81,009
Netherlands	18,200	19,789	22,422	21,337	27,239
Germany	15,291	17,407	22,997	20,988	21,048
Mexico	4,516	4,088	8,220	11,820	11,192
Bel-Lux	1,304	1,851	3,643	5,394	6,851
Japan	4,298	3,790	4,492	4,187	4,045
Italy	2,208	3,294	2,549	3,919	2,270
United Kingdom	1,268	940	1,036	1,360	2,052
Switzerland	1,376	1,609	1,554	1,578	1,519
United Arab Emirates	1,748	796	1,157	518	1,228
Spain	1,707	1,152	2,117	1,369	1,112
Others	8,641	10,110	9,014	10,435	10,732
Total	94,114	157,197	167,742	168,816	170,297
Total World	104,887	186,741	201,441	201,321	209,397

Source: U.S. Department of Commerce, Bureau of the Census.

European Union Imports of Fresh Cut Flowers
Calendar Years 1988-1992
(U.S.\$1,000)

Origins	1988	1989	1990	1991	1992
Total EU 1/	1,613,354	1,606,978	2,021,237	2,305,733	2,467,649
EU Trading Partners					
	1,359,826	1,363,113	1,699,543	1,919,521	2,017,742
The Netherlands	1,212,556	1,205,257	1,536,727	1,755,626	1,840,312
Italy	60,919	70,131	79,007	77,979	84,123
Spain	51,772	54,374	46,084	42,579	43,635
France	10,226	10,637	12,336	14,836	17,080
Germany 2/	11,049	9,878	10,935	12,262	13,829
United Kingdom	7,856	8,196	8,725	8,574	10,482
Belgium/Luxem.	3,084	3,040	3,901	5,492	6,056
Denmark	323	260	326	1,379	1,533
Portugal	1,009	865	993	578	410
Ireland	54	74	167	190	178
Greece	978	401	342	26	104
Other Trading Partners					
	244,370	235,756	311,923	376,646	437,409
Israel	97,440	84,161	111,171	116,291	123,361
Colombia	42,154	41,777	56,914	92,652	116,457
Peru	2,408	2,375	2,915	6,818	7,671
Ecuador	2,058	1,968	2,205	4,023	7,584
Brazil	1,612	1,600	2,127	3,248	3,905
Thailand	21,170	22,274	26,693	30,781	31,744
Singapore	1,585	1,494	1,912	2,455	2,811
Canary Islands	17,102	14,666	17,788	15,899	13,897
Turkey	3,183	7,543	11,099	11,915	12,670
Morocco	6,188	7,316	11,101	12,956	14,199
Kenya	29,012	30,402	40,022	46,773	56,080
Zimbabwe	6,372	7,150	11,714	15,520	28,390
South Africa	7,235	6,374	7,827	8,727	8,258
Mauritius	1,927	1,977	2,878	2,744	2,705
Zambia	450	512	940	1,609	2,380
Ethiopia	2,840	3,018	2,854	1,661	1,670
United States	1,372	902	1,273	1,754	1,281
Costa Rica	262	247	490	820	2,346
Others	9,158	8,109	9,771	9,566	12,498

Source: Eurostat. Note: Totals are shown in bold print. 1/ Exchange rates, dollars per ECU: 1988 (1.1839); 1989 (1.1024); 1990 (1.2731); 1991 (1.241); 1992 (1.2968). 2/ (<91, W. Ger.)

THE 1994 MARKET PROMOTION PROGRAM

Through the Market Promotion Program (MPP), the USDA allocates funds to non-profit trade organizations and private entities to promote U.S. agricultural products in foreign markets. These organizations and companies use this money to supplement their own funds to carryout activities such as advertising, merchandising, printing of promotional materials, and public relations. These promotional dollars have helped U.S. horticultural products grow faster than any other commodity segment.

Authorized by the 1990 Farm Bill, the MPP is administered by the Foreign Agricultural Service. The program has seen many changes over the years and 1994 was no exception. For 1994, all participants are required to submit a description of an unfair trade practice (UTP) by a foreign country in order to participate in the program. A UTP is defined as a trade barrier that adversely affects trade in a given commodity. Examples include seasonal import bans, minimum grower prices, or reference pricing systems. In the past, participants with valid UTP's received preferential treatment, but a UTP was not a requirement. Other changes include a five-year limit on branded products using MPP funds in any one country; certification that MPP funds will supplement, not supplant, any private funds; a minimum 10 percent contribution on non-brand promotions by the commodity organization; and preference for small-sized entities. For 1994, Congress authorized \$100 million for the program, a 32 percent cut from last year.

MPP funds are allocated to many non-profit trade associations, which manage both generic and branded activities overseas. Commodities supported range from feed grains to cotton to forest products to apples. In fiscal year 1994, \$39.3 million, about 39% of all MPP funds, were earmarked for horticultural products. Table 1 lists the FY 1994 budget levels, which include the 1994 allocation plus unused funds from previous years' allocations.

The objective of MPP is to create, expand, and maintain U.S. export markets. In general, this program tends to emphasize products that can demonstrate an immediate and/or sustained increase in exports. Under the program, horticultural products have been growing at a fast pace relative to other agricultural sectors, and therefore, fall easily into the mission of the program.

Activities carried out under the program tend to be highly visible, such as Washington apple television commercials in Malaysia, poster campaigns for California walnuts in Germany, and print advertising for U.S. wines in the United Kingdom.

The Export Incentive Program (EIP)

In cases where no national non-profit organization represents a commodity, the Export Incentive Program is used to help companies expand exports.

Unlike the MPP programs managed by the non-profits, only private companies participate in an EIP. These companies enter into an agreement with USDA to carry out brand promotions abroad. The reimbursable costs for this program are limited to costs associated with direct promotion, such as advertising and public relations. USDA reimburses EIP participants to carry out brand promotions abroad, usually on a dollar for dollar basis. At present, only horticultural commodities have EIP's.

(Steve Shnitzler, 202-720-8495)

**Horticultural Organizations: FY1994 Budget
Ceilings for Market Promotion Program**
Table 1

Participant Name	1994 Budget (\$ millions)
Almond Board of California	3.484
Asparagus USA	.339
American Brandy Association	.645
California Avocado Commission	.450
California Cling Peach Advisory Board*	1.340
California Kiwifruit Commission	.389
California Pistachio Commission	1.392
California Prune Board	3.601
California Strawberry Commission	.685
California Table Grape Commission	2.830
California Tomato Board	.300
California Tree Fruit Agreement	1.082
California Walnut Commission	3.481
Cherry Marketing Institute (tart cherries)	.307
Florida Department of Citrus	6.000
Ginseng Board of Wisconsin	.273
Hop Growers of America	.160
National Honey Board	.252
National Potato Promotion Board	2.241
Northwest Wine Promotion Coalition	.470
New York Wine & Grape Foundation	.350
OR-WA-CA Pear Bureau	1.495
Raisin Administrative Committee	4.479
USA Fresh Sweet Cherry Promotion	.863
International Apple Institute **	.552
Washington State Apple Commission	3.747
Wild Blueberry Association of North America	0.005
Wine Institute	8.450
CA/AZ Fresh Citrus - EIP	3.665
Concord Grape - EIP	.100
Cranberry - EIP	.600
Malt Cooler - EIP	.100
Processed Corn - EIP	.992
Processed Tomato - EIP	.400
TOTAL	55.529

* Includes Pacific Coast Canned Pear Service

** Promotes apples other than those from Washington state

NEW ZEALAND'S HORTICULTURAL INDUSTRY AND THE COMPETITION OUTLOOK IN WORLD MARKETS

[Note: This is the third competition article in a series. India was featured in the May issue, Australia in April.]

Over the past decade, New Zealand's agricultural export industries have adjusted to economic reforms, which have reduced domestic protection and encouraged producers to seek overseas markets. Growers of apples and kiwifruit rely on export markets for a large percentage of their production. Assistance for exporters is provided through the government-funded TRADENZ and the various producer/grower funded marketing boards. This report examines the efforts of four organizations with a combined promotional budget of about \$22 million. The process of reform continues in New Zealand, as evidenced by the Apple and Pear Marketing Board (APMB) divesting itself of control of fruit imports beginning this season. Similar moves toward streamlining grower boards include the Kiwifruit Marketing Board's (KMB) recent decision to allow food industry giant Dole to handle sales, marketing, and distribution of New Zealand's kiwifruit exports to Japan. The lifting of protection for New Zealand's wine industry beginning in 1984 has forced it to adapt to a competitive domestic environment and seek export markets.

Overview of New Zealand's Horticultural Industry

This report focuses on export prospects for four commodities: apples, pears, kiwifruit, and wine.

New Zealand's agricultural sector over the past five years has shifted away from the predominance of sheep (meat and wool) toward other enterprises such as dairy, forestry and horticulture. Although famous throughout the world for kiwifruit, New Zealand is also an important producer of apples for the export market. Indeed, many popular apple varieties (e.g., Braeburn and Gala) were developed in New Zealand. Less well known in export markets are the country's wines. According to projections by the domestic wine industry, New Zealand hopes to achieve annual export earnings of NZ\$100 million (U.S.\$54 million) by the end of the century.

Approximately 3.7 percent or 100,000 hectares of New Zealand's total land area are planted to various horticultural crops. Outdoor horticultural crop area is about 50,000 hectares. The following table presents area planted, production, and export data for selected fruits and wine. With a population estimated at only about 3.5 million and a high per-capita consumption of fruits and vegetables, the country relies on export markets for certain horticultural commodities. Prominent in world trade are its kiwifruit and apples. Anecdotal evidence suggests that on average each New Zealander eats 12 servings of fruit and vegetables daily, one of the highest per capita consumption rates in the world. The daily per capita target for the United States is five servings a day.

**NEW ZEALAND: Production of Selected Horticultural Commodities
(Hectares; Metric Tons; Liters 1/)**

Commodity	Area	Production	Exports
Apples	12,000	497,150	240,500
Pears	920	18,510	2,868
Kiwifruit	13,000	216,800	190,000
Wine 2/	6,109	41,600,000	7,100,000
Stone Fruit	3,600	45,000	2,420
Avocados	1,500	n/a	n/a
Persimmons	500	n/a	n/a
Citrus	1,500	n/a	n/a

Source: USDA publications FHORT 3 & 4-94; Wine Institute of New Zealand, "New Zealand Wine 1993-2000: A Working Paper", 1993.

1/ Data for fruit are for 1993/94, for wine, 1992.

2/Production and Exports are in liters.

New Zealand is a Southern Hemisphere country with different harvest seasons from those in the United States. In previous years New Zealand has, therefore, not been considered a direct competitor in export markets for fresh products. However, increases in global production combined with improvements in storage facilities and technology (e.g., controlled atmosphere storage) have enabled sales to overlap, leading to increased competition and downward price pressure in certain markets.

GOVERNMENT ASSISTANCE FOR EXPORTS

New Zealand's export promotion is primarily the responsibility of the various marketing boards and private industry. Funding for the commodity boards is generated through producer/grower contributions. Reportedly, the only direct Government promotion is conducted through the organization TRADENZ, formerly the Trade Development Board. The table below shows that government funding for all export promotional activities for FY 1993 (July/June) reportedly reached U.S.\$3.2 million, or about 15 percent of total budget for TRADENZ during that period. Not all of this amount was directed toward horticultural commodity exports. Other services funded by TRADENZ include market analyses and consultancies on export potential of various commodities. Numerous small businesses have benefitted from TRADENZ's export consultancy services, which are assessed on a partial cost-recovery basis.

NEW ZEALAND: Export Promotion Budgets and Associated Export Revenues (Fiscal Years; NZ\$million) 1/

Organization	1990/91	1991/92	1992/93
TRADENZ (Govt. NZ)	6.0	5.5	6.1
Apple & Pear Board 2/	8.0	8.5	9.0
FOB Revenue	297.3	325.9	340.8
Kiwifruit Board 2/	30.0	27.7	31.9
FOB Revenue	437.7	506.1	370.0
Hort. Export Authority	0.2	0.8	1.0
FOB Revenue	62.6	89.0	81.5

Source: FAS/Wellington post report NZ4008.

1/Various fiscal years are reported.

2/Both exercise monopoly rights over exports.

3/Exchange rates (NZ\$ = \$1.00): 1990/91, 1.673; 1991/92, 1.808; 1992/93, 1.880.

The above table indicates the relative importance of kiwifruit in the overall funding of horticultural export promotions. This is understandable given that FOB returns on kiwifruit exports for the 1993 campaign were NZ\$370 million (U.S.\$197 million), the largest component of export revenue listed above.

KIWIFRUIT MARKETING BOARD (KMB) PULLS BACK FROM HUGE DEFICIT

The KMB is the sole authority for marketing New Zealand's export-grade kiwifruit, except for shipments to Australia. The KMB is responsible for buying the fruit and for coordinating the packing, cold storage, and movement of fruit to export channels. It also is tasked with research and development.

The financial stability of the KMB was put to test two years ago when an inaccurate pre-harvest forecast led the KMB to conclude that restricting harvested volumes would not be necessary. However, the final crop that year was well above the 60-million tray estimate at 67.3 million trays (275,100 tons). The final export total was 55 million trays (203,000 tons). As a result of this over-supply situation the KMB sustained huge losses, which lowered grower returns on the 1991/92 crop (harvest 1992) and necessitated large bank loans to meet payments. Although the situation improved in 1992/93, the loan will likely be fully repaid only after the current export campaign.

New Zealand is synonymous with kiwifruit. It is the world's second leading producer and exporter after Italy. The following table presents kiwifruit trade data and shows that the EU is the major market for the KMB. Japan is the leading Asian destination for New Zealand's kiwifruit.

NEW ZEALAND: Kiwifruit Production & Trade (Calendar Years; Metric Tons)

	1991	1992	1993
Production	278,000	275,100	225,000
Exports	209,504	202,071	187,069
EU Countries	119,536	109,204	104,417
United States	24,631	11,698	6,183
Australia (non-KMB)	12,507	14,747	12,539
Japan	43,340	49,820	44,238
Taiwan	2,262	4,212	3,902
Hong Kong	1,217	1,512	1,458
Korea	1,334	2,210	2,231
Singapore	532	678	611
Others	4,145	8,891	11,490

Source: USDA publication FHORT 4-93 and FAS/Wellington report NZ4004, New Zealand Dept of Statistics.

KMB Signs Marketing Contracts with Dole for Japan and Geest for the United Kingdom

Recently the KMB announced that it will contract with Dole to handle kiwifruit sales, marketing, and distribution in Japan. This development reportedly reflects difficulties encountered by the KMB's Japan office in working with local distributors and the complex marketing system. Under the terms of the agreement, Dole will deal exclusively with New Zealand kiwifruit, which will be marketed under the KMB's "World's Finest" brand rather than a Dole brand. The KMB remains the principal importer; Dole handles all logistics, including storage and repacking. This arrangement seeks to prevent marketing glitches such as those which occurred last season, when Japanese distributors reportedly destroyed over 100,00 trays of kiwifruit.

The KMB has also signed a similar distribution agreement with Geest for the U.K. market.

KIWIFRUIT HAS PROMOTIONAL CLOUD

Compared to the promotional money available for exports of other horticultural commodities,

kiwifruit has the lion's share. The KMB spent NZ\$31.9 million (U.S.\$17 million) during 1992/93, up 15 percent over the previous year. This reflects initiatives to target new markets and boost demand in less developed markets. This shift is in part attributed to increased pressure from competitors in more mature markets. In established markets the focus has moved from generic consumer advertising to branded promotion at the point of sale. The KMB promotional efforts are orchestrated through offices in Belgium, Japan, and Canada.

NEW ZEALAND: Kiwifruit Marketing Board (NZ\$ million)

	1990/91	1991/92	1992/93
Promotional Spending	30.0	27.7	31.9
FOB Export Revenue	437.7	506.1	370.0

Source: New Zealand KMB; New Zealand Dept of Statistics as reported in NZ4008.

U.S. COMPETITION IN ASIAN MARKETS

Asian markets accounted for about 56 percent of U.S. kiwifruit export volume in 1993. In percentage terms, Asia's share of the composition of U.S. exports is about twice that of New Zealand. However, in absolute terms New Zealand ships slightly over 10 times the volume of kiwifruit to Asian markets.

KIWIFRUIT: Exports to Asian Markets (Calendar Years; Metric Tons)

	1991	1992	1993
JAPAN			
New Zealand	43,340	49,820	44,238
United States	18	1,522	244
HONG KONG			
New Zealand	1,217	1,512	1,458
United States	301	157	262
TAIWAN			
New Zealand	2,262	4,212	3,902
United States	936	1,688	3,411
KOREA			
New Zealand	1,334	2,210	2,231
United States	449	437	988
SINGAPORE			
New Zealand	532	678	611
United States	88	49	25
TOTAL			
New Zealand	48,685	58,432	52,440
United States	1,792	3,853	4,930

Source: U.S. Census Bureau data; New Zealand Dept of Statistics in NZ4004.

California and the California Kiwifruit Commission (CKC) Account for all U.S. Kiwifruit Exports

The CKC has re-built the Taiwanese market in the face of increasing competition. New Zealand is a strong competitor of California due to its reputation of delivering only high quality fruit and increasing promotional activities. In addition, New Zealand uses a flexible pricing strategy, whereby kiwifruit prices are adjusted downward as soon as U.S. product arrives in the market. Moreover, improved storage capability and an abundance of fresh fruit have enabled New Zealand exporters to extend their season. This results in overlapping seasons and increased competition with U.S. kiwifruit in that market.

APPLE & PEAR MARKETING BOARD (APMB) NO LONGER CONTROLS IMPORTS

The APMB operates as the sole authorized seller of New Zealand apples and pears to export markets. Partial deregulation of the APMB has occurred, with control over imports and the domestic market ending as of January 1, 1994. There has been considerable interest from large-scale producers in breaking the APMB's monopoly on exports. One company has unsuccessfully petitioned the APMB for permission to ship 500,000 cartons of apples to overseas markets. The same company has explored the possibility of shipping trial containers of its apples to test markets, an action which has yet to be approved by the board. Attempts such as these will possibly lead to a loosening of the APMB's control over exports in coming seasons.

Exports Crucial for Healthy Apple and Pear Industries

The following table shows that New Zealand has exported on average about 53 percent of commercial apple production, and 24 percent of commercial pear production over the past three seasons. This export ratio is rather high compared with other suppliers. For example, the average composition of exports to commercial production for selected world apple suppliers in 1992/93 was about 12 percent. This indicates the relative importance of export market development for New Zealand's fruit industry.

As stated above, there is little scope for large gains in domestic consumption, as New Zealand already has one of the higher per capita rates in the world.

NEW ZEALAND: Apple & Pear Production and Trade (Marketing Years; Metric Tons)

	1991/92	1992/93	1993/94
APPLE			
Production, Total	443,400	488,765	497,150
Production, Commercial	394,013	438,765	442,150
Exports	208,107	231,916	240,500
Imports	352	853	2,000
PEAR			
Production, Total	17,619	18,451	18,510
Production, Commercial	11,618	11,951	12,010
Exports	2,424	2,812	2,868
Imports	279	691	1,000

Source: USDA/FAS publication FHORT 3-94.

Note: New Zealand fruit in 1993/94 year are harvested in 1994.

New Zealand's major apple markets are the United States and EU countries. Promotional efforts focus on participation in trade fairs and trade publications. Television advertising was used in the U.K. market for the first time in 1992/93. The Board recently launched a full media strategy promoting the "ENZA" brand of apples. This branding effort emphasizes New Zealand's distinctive mix of available varieties, as well as quality characteristics and trade servicing.

COMPETITIVE OUTLOOK

Prospects for exports in 1993/94 and beyond are improved as tree removals have enhanced the mix of varieties marketed by the APMB. Replanting efforts have focused on varieties (e.g., Royal Gala, Braeburn, Fuji, and Fiesta) that show promise in export markets. The APMB is committed to providing new varieties to meet the evolving taste preferences of export markets.

Asian markets accounted for only about 10 percent of New Zealand's export volume in 1992/93. However, the APMB aims to expand Asia's share in Japan. New Zealand growers have recently completed the lengthy certification process necessary for access to the Japanese

market, and have begun shipments. Access has been gained for six apple varieties; the first shipment was of Royal Gala. This certification process is not unlike the one under way in Washington state.

The Board buys the entire crop from export growers, and packs, stores, and markets both fresh fruit and juice extracted from lower-grade fruit. Sufficient profits are retained to fund Board operating expenses and maintain capital reserves; the balance is distributed to growers.

NEW ZEALAND: Exports of Apples (Local Marketing Years; Metric Tons)

Market	1991/92	1992/93
United Kingdom	54,653	55,261
Other EU Countries	83,828	92,042
United States	34,898	33,072
Singapore	6,634	8,637
Hong Kong	3,048	6,655
Malaysia	3,908	4,480
Sweden	8,177	5,987
Russia	0	2,424
Mexico	77	2,395
Others	8,066	15,261
TOTAL	203,213	223,817

Source: New Zealand Dept of Statistics as reported in NZ4001. Local marketing year is June/May.

The APMB's expenditure on promotion and advertising is conservatively estimated at about NZ\$9.0 million (U.S.\$3.8.8 million) for both domestic and export markets. This figure does not include funding from the Board's clients in foreign markets, which in some cases match those allocated by the APMB. The Board maintains overseas offices in the United Kingdom, Belgium, Germany, Canada, and Australia (Melbourne and Sydney). The table below shows that New Zealand's APMB has enjoyed a high rate of return on investment in export promotion, although volume increases have also contributed.

NEW ZEALAND: APMB Promotional Budget (NZ\$ million)

	1990/91	1991/92	1992/93
Promotional Spending	8.0	8.5	9.0
FOB Export Revenue	297.3	325.9	340.8

Source: FAS/Wellington estimates; N.Z. Dept. of Statistics.

HEA CONTRACTS WITH PRODUCER GROUPS

New Zealand's Horticultural Export Authority (HEA) was established in 1987 to assist in the external marketing of horticultural products. Prior to FY'93, the HEA received small amounts of government subvention (see table above). Since last year the government stopped direct financial assistance to the HEA, although some trade promotion money is reportedly being diverted from TRADENZ for individual activities. However, the majority of budget for HEA administration and promotional efforts is derived from funds contributed by the commodity groups with which the HEA has contracts.

HEA research and promotion focus on Japan and other Asian markets

The HEA has expanded its commodity coverage and budget for market promotions. HEA currently is spending about NZ\$1.0 million (U.S.\$531,000) annually on these activities, most of which are directed toward expanding markets in Japan and other Asian countries. Despite the focus on Asia, there remains some promotional activity in Australia, New Zealand's traditional market for horticultural products.

Among the many commodity groups contracting with the HEA are those representing squash, apricots, cherries, nectarines, persimmons, avocados, and specialty vegetable crops for the Japanese market. Approximately half (U.S.\$160,000) of HEA's total promotional budget has been allocated for research into Japanese consumer and trade perceptions about New Zealand as a preferred supplier of squash. This information will be used to develop a marketing strategy to expand the already lucrative NZ\$60 million (U.S.\$32 million) squash market. The second largest HEA promotional effort in 1994 is for persimmons (U.S.\$53,000), aimed mainly at Singapore, Malaysia, and Japan. The table below shows the returns to promotional activities in terms of the value of exports for targeted commodities.

NEW ZEALAND: Horticultural Export Authority (NZ\$ million)			
	1990/91	1991/92	1992/93
Promotional Spending	0.2	0.8	1.0
FOB Export Revenue	62.6	89.0	81.5

Source: HEA, New Zealand Dept. of Statistics as reported in FAS/Wellington NZ4008.

NEW ZEALAND'S WINE SPILLS INTO EXPORT MARKETS

New Zealand's wine industry has made great strides in the past decade, moving from protected domestic producer to active player in export markets. Wine exports have risen steadily since 1984 from less than 1.0 million liters to 7.1 million liters, valued at U.S.\$18.5 million. The New Zealand Wine Institute's goal for the end of the century is to increase production, expand domestic demand, and boost export value to U.S.\$54 million. Its wines are renowned for consistently high quality in recent



years. The task now is to encourage investment in planting vineyards and to sustain successes in promoting wine exports.

Formerly: Heavy Protection; Few Exports

New Zealand's wine industry developed within a heavily regulated economy. Wine was targeted almost exclusively for the protected domestic market and exports were not considered a priority. Tax incentives of the late 1970s and

early 1980s led to plantings that encouraged volume rather than quality of wine and contributed to burdensome stocks. This changed in 1984, as tax breaks were phased out and imports were liberalized. Furthermore, a government vine-pulling program was implemented to address the problem of low-quality vines. Collectively, these actions have helped to improve the long-term health of the New Zealand wine industry. This policy also opened the domestic market to competition and has forced local vintners to look for export markets.

Domestic Consumption Forecast to Rise

The following table provides industry estimates of domestic wine consumption in 1992, with a forecast for the year 2000. According to industry projections, per capita consumption is anticipated to increase from 15.4 liters to 17.5 liters by the end of the century.

NEW ZEALAND: Wine Consumption (Million Liters)

	1992	2000
Domestic Wine	44.0	52.5
Imported Wines	8.4	9.0
Total Consumption	52.4	61.5

Source: Wine Institute of New Zealand, Inc.

Investment is Lacking

Investment in the wine industry has been sluggish in the 1990s. The table below shows that the area in bearing vines increased steadily while total area planted remained static. Industry reports suggest that for the last half of the 1990s, the increase in producing area will not likely exceed six to seven hectares annually. Thus, further increases in production are likely to be limited for the balance of the century. Current indications are that the industry will be about 2,000 hectares short of the optimum area needed to meet New Zealand's export potential by the year 2000. An investment of an estimated NZ\$72 million (U.S.\$38.3 million) would be needed to expand to the "optimal" area.

One reason cited for the lack of investment in wine is the high excise tax, currently about 45.8 percent, on average. Competition from imports has ended the practice of cost-plus pricing that held sway in the years before deregulation. The price pressure on wineries is reportedly transferred to the grape grower. Although excise taxes are not assessed on exports, the wine industry in New Zealand is still primarily focused on the domestic market. About 85 percent of production is consumed locally. The industry is reportedly seeking an excise regime which reflects the reality of a deregulated economy.

Another reason for investment reluctance is the potential risk coming from health concerns. There has been some discussion in recent years of additional taxation of alcoholic beverages as a means of curbing consumption and generating revenues for health care.

NEW ZEALAND: Wine Industry Statistics (Hectares; Metric Tons; Million Liters)

	1990	1991	1992
Total Vine Area	6,000	6,000	6,000
Bearing Area	4,873	5,400	5,800
Tons Crushed	70,265	65,708	55,500
Total Production	54.5	49.9	41.6
Domestic Sales	39.2	41.1	44.0
Stocks:Sales Ratio	1.73:1	1.65:1	1.28:1
Export Volume	4.0	5.6	7.1
Export Value (NZ\$mill)	18.4	25.3	34.7

Source: Wine Institute of New Zealand, Inc., "Annual Report 1992".

Image of Quality

The improved image of New Zealand wine in recent years has paralleled its success in international competitions. Especially noteworthy are its Sauvignon Blanc and Chardonnay wines, although strides have been made in Pinot Noirs and Cabernet Sauvignons, and in Cabernet/Merlot blends. The composition of exports in 1992 was: white wines, 81 percent; red wines, 13 percent; sparkling wines, 5 percent; and fortified wines, 1 percent. More than 30 countries import New Zealand wines, some of which are listed in the table below.

NEW ZEALAND: Wine Exports (Marketing Years; Million Liters)

Market	1989	1990	1991	1992
United Kingdom	1.06	1.19	2.18	3.63
Sweden	0.15	1.06	0.92	0.88
Finland	--	--	--	0.67
Australia	0.88	0.74	0.72	0.66
Japan	0.37	0.64	1.22	0.55
Canada	0.10	0.10	0.14	0.16
Ireland	--	--	--	0.13
United States	0.06	0.13	0.15	0.11
Cook Islands	0.02	0.02	0.01	0.02
Others	0.06	0.12	0.26	0.28
TOTAL	2.70	4.00	5.60	7.10

Source: New Zealand Wine Institute, Inc.

GOVERNMENT ASSISTANCE TO WINE EXPORTS

Export promotional funds for wine from the government are available through TRADENZ, which had a total budget for all commodities of NZ\$6.1 million (U.S.\$3.2 million) in 1992/93. Other funding is available through direct contributions of wineries. The New Zealand Wine Institute also works in conjunction with TRADENZ on promotional efforts, such as sponsoring the 1992 visit to New Zealand of the Liquor Control Boards from British Columbia, Ontario, and Quebec. The Institute also prepares promotional publications for distribution to consumers through wineries and supermarkets.

The Competitive Edge: Export Quality and Labeling Guarantees

In its recommendations for the year 2000, the wine industry proposed introducing rules governing the integrity of wine labels as well as the quality of product. These two reforms are considered central to the country's long-term ability to market its wines overseas. Labels would guarantee the origin of New Zealand wine, and would be designed to conform with international standards. Regulations governing quality of wine are to be upgraded to meet standards for wine of assured quality. New Zealand's current export certification system would be expanded to ensure compliance with import regulations of destination markets.

(For further information on supply, distribution, and trade, contact Ross Kreamer, 202-720-9903. For information on production, contact Kelly Kirby at 202-720-6791.)

U.S. HORTICULTURAL TRADE WITH CARIBBEAN BASIN INITIATIVE BENEFICIARY COUNTRIES INCREASES AGAIN IN 1993

U.S. imports of horticultural products from Caribbean Basin Initiative (CBI) countries in 1993 increased 2 percent to a record \$880 million. Cantaloupes, pineapples, and ornamental products were the leading items, other than bananas, which is the largest import item. Moreover, U.S. exports of horticultural products to CBI countries reached a record \$260 million in 1993, mainly fresh and processed vegetables, fresh fruits, and fruit juices. Improved living standards and increased health consciousness among Caribbean and Central America consumers are among the reasons for larger U.S. exports to these countries. Strong emphasis on production and exports of fruit and vegetables, and market liberalization in CBI countries, combined with increased promotion efforts by U.S. firms, make the future bright for U.S. horticultural trade with CBI countries.

Summary

U.S. imports of horticultural products from Caribbean Basin Initiative (CBI) countries in 1993 increased 2 percent to \$880 million. Cantaloupes, pineapples, and live plants were the most important items, other than bananas and plantains, which enjoyed duty-free access into the United States before the CBI was implemented. Costa Rica, Guatemala, and Dominican Republic are the largest CBI traders, accounting for about 73 percent of total U.S. horticultural product imports from CBI countries in 1993.

On the other hand, U.S. exports of horticultural products to CBI beneficiaries in 1993 reached a record \$260 million, 21 percent above shipments in 1992. Fresh and processed vegetables, fresh fruits, and fruit juices are the leading U.S. horticultural products destined for CBI countries. The Bahamas is by far the largest importer of U.S. horticultural products, accounting for \$83 million in 1993.

On January 1, 1994 NAFTA's Schedule "A" tariff cuts were implemented. Under this schedule, tariffs were eliminated for many horticultural product imports from Mexico. Among the more significant horticultural products from CBI countries that will likely be

affected by increased competition from Mexico because of the tariff cuts are: cantaloupes (December only), pineapples, ornamental products, fresh peas, papayas, and mangoes.

The Caribbean Basin Economic Recovery Expansion Act

The Caribbean Basin Economic Recovery Expansion Act was signed into law on August 20, 1990, making permanent the Caribbean Basin Initiative (CBI). The program grants duty-free treatment to all imports, except textiles and apparel, leather goods, footwear, petroleum products, canned tuna, watches and watch parts from 24 countries in the Caribbean and Central America. Caribbean Basin Initiative beneficiaries are: Antigua and Barbuda, Aruba, Bahamas, Barbados, Belize, Costa Rica, Dominica, Dominican Republic, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Monserrat, Netherlands Antilles, Nicaragua, Panama, Saint Christopher and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, and the British Virgin Islands.

Many products from CBI beneficiary countries already had duty-free treatment under the previously existing Generalized System of

Preferences (GSP), or because of zero Most Favored Nation (MFN) tariffs. In this article, these commodities are called "Not Dutiable." Products that had duties prior to enactment of the CBI are described here as "Dutiable." Dutiable items are divided into two categories; "Fast Track" and "Non-Fast Track." Fast Track products are certain perishable items that are given duty-free treatment by CBI, but can have duty-free treatment removed if increased imports are proven to have a substantial negative impact on the U.S. domestic industry. Non-Fast Track commodities are all other products that were previously dutiable and for these items, duty-free status cannot be removed. To date, the Fast Track procedure has never been used to remove duty-free treatment.

U.S. Imports

In 1993, total U.S. imports of Fast Track and Non-Fast Track items decreased 7 percent to \$109 million, due primarily to a sharp decrease in the import value of frozen concentrated orange juice (FCOJ), and processed pineapple. Ample supplies of FCOJ in the United States and Brazil, and increased production of canned pineapple in Thailand and the Philippines, pushed down international prices for these commodities in 1993. On the other hand, Not Dutiable imports reached a record \$250 million in 1993, with cantaloupes, mangoes, and frozen peas accounting for the largest increases.

For Fast Track products, pineapples continued to be the top import product in 1993 at \$43 million, up slightly from 1992. Most U.S. imports of pineapples are from Costa Rica and Honduras. FCOJ is the second largest import item, although decreasing almost 50 percent in 1993 to \$12 million due to abundant supplies in the United States and Brazil. Belize and the Dominican Republic provided most of the FCOJ imported into the United States from CBI countries in 1993.

For Non-Fast Track commodities, the two categories registering the largest decreases in import value in 1993 were processed peas and processed pineapples, down 90 and 35 percent, respectively. Decreased production of processed peas in the Dominican Republic was the reason for reduced shipments of this product to the United States in 1993. On the other hand,

production of canned pineapple increased in Thailand and the Philippines, which reduced export prices in 1993.

Total U.S. imports of Non-Dutiable products, other than bananas and plantains, increased 11 percent to \$250 million in 1993. Fresh cantaloupe was again the largest import item totaling \$48 million, up 30 percent from 1993. Other Non-Dutiable products showing increases included live plants, cut flowers, yams, cassava, papayas, winter melon, mangoes, and frozen peas. In 1993, fresh bananas continued to be the single largest U.S. horticultural import commodity from CBI countries, valued at \$517 million.

Major Suppliers

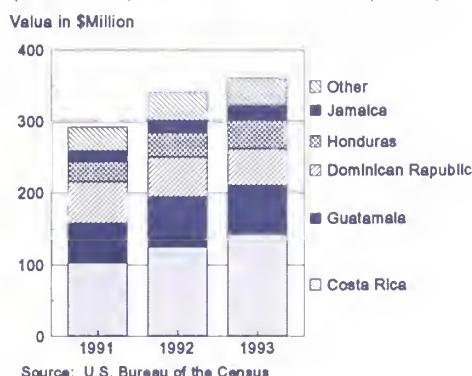
Costa Rica continues to be the largest CBI beneficiary, accounting for 40 percent of horticultural trade in products other than fresh bananas and plantains in 1993. U.S. imports of horticultural products from Costa Rica increased 15 percent to \$143 million in 1993. Pineapple, pineapple juice, cantaloupe, FCOJ, and cut flowers were the major commodities exported to the United States in 1993 in addition to bananas, which is Costa Rica's largest export product. Pineapples, which are mainly exported to the United States and Europe, account for about 20 percent of Costa Rica's total export value of non-traditional products. Other important non-traditional export products are ornamental plants, foliage and flowers, and melons.

Guatemala, the second largest CBI supplier, reduced exports of horticultural products (other than bananas and plantains) to the United States by 3 percent in 1993 to \$67 million. Major Guatemalan commodities exported to the United States included frozen broccoli, macadamias, cantaloupes, and fresh peas. The fruit and vegetable industries in Guatemala have continued expanding and have become far more organized and accustomed to U.S. regulations and market requirements over the past six years.

Agriculture is the principal economic activity in Guatemala, accounting for about 25 percent of Gross National Product (GNP), 75 percent of total export earnings, and 60 percent of employment. The agricultural sector continues to be dominated by traditional export crops,

Costa Rica, Guatemala, and the Dominican Republic were the Largest CBI Suppliers of Hort. Products to the United States In 1993

(all horticultural products other than bananas and plantains)



especially coffee, sugar, and bananas.

Dominican Republic reduced exports of horticultural products to the United States for the second consecutive year. In 1993, total horticultural trade, other than bananas and plantains, decreased 7 percent to \$52 million. The decrease in U.S. imports from Dominican Republic was mainly the result of reduced supplies of pineapple, avocados, oranges, processed peas, and FCOJ. Pineapple is the Dominican Republic's major horticultural export to the United States, totaling \$4 million in 1993, 33 percent below 1992 shipments.

Agriculture accounts for about 15 percent of the Dominican Republic's total GNP, approximately 50 percent of total commercial exports, and directly employs around 11 percent of the labor force. Emphasis is being given to increased domestic production of fruit and vegetables (non-traditional agricultural products) for export. The commodities getting the most attention are oranges, grapefruit, tropical fruits, tomatoes and melons.

Honduras' exports of horticultural products (other than bananas and plantains) to the United States increased 18 percent to \$40 million in 1993. Pineapple, FCOJ, cantaloupes, and frozen bananas were the major items exported, keeping Honduras the fourth largest CBI supplier. Pineapples and melons are the largest Honduran

non-traditional fruit export. On the other hand, the value of Honduran shipments of bananas to the United States has decreased in the last four years from \$141 million in 1990 to \$105 million in 1993. Labor disputes and outbreaks of sigatoka disease have affected Honduran banana production and subsequently exports.

Agriculture has traditionally played a dominant role in Honduran economic activity, accounting for about 25 percent of the country's GDP. This contribution is roughly double that of the manufacturing and commercial sectors. Agricultural operations also provide employment for nearly half of the country's work force and generate about 75 percent of export earnings. One of the major problems with Honduran agriculture continues to be its over dependency on its traditional sector, particularly on exports of bananas and coffee. However, some progress have been made in the non-traditional sectors, mainly in the pineapple and melon industries.

In 1993, **Jamaica** displaced Belize as the fifth largest CBI supplier. Shipments of horticultural products from Jamaica, excluding bananas and plantains, to the United States reached \$20 million in 1993, up 18 percent from the previous year's shipments. A sharp increase in yams and papaya is the major reason for larger exports. Other commodities of importance included FCOJ and oranges.

Agriculture is one of three pillar industries in the Jamaican economy, the other two being tourism and mining (bauxite). Though it contributes only 8 to 10 percent to GDP, it employs about 23 percent of the labor force. The steady improvement in agricultural production, which began in 1990, continued through 1993. The positive performance can be attributed to a number of factors including increased export trade, improvements in cultivation practices, and favorable weather conditions.

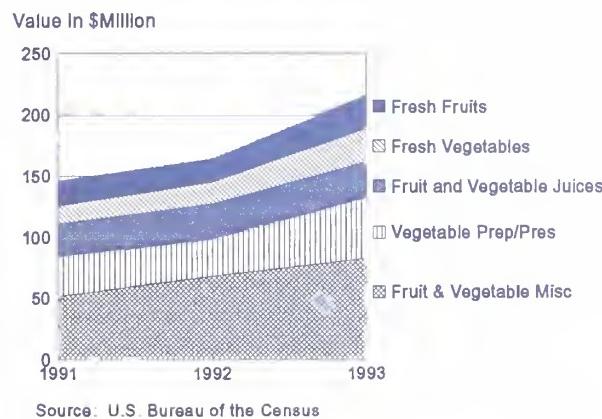
U.S. Exports

U.S. exports of horticultural products to CBI beneficiaries in 1993 reached a record \$260 million, 21 percent above shipments in 1992. The largest increases occurred in the Bahamas, Costa Rica, Dominican Republic, Guatemala, Honduras, Panama, and Guyana. Together, these countries accounted for almost 70 percent of total U.S. exports of horticultural commodities to the Caribbean region in 1993. Fresh and processed vegetables, fresh fruits, and fruit juices are the leading U.S. horticultural products

destined to CBI countries. During the last five years, in addition to the CBI program, which in part has improved economies in the Caribbean and Central American countries, market liberalization in the region and increased marketing promotion activities by exporter firms, have made CBI countries able to import more from the United States.

U.S. exports of fresh vegetables to CBI countries have been increasing steadily in the last 5 years from \$11 million in 1989 to \$27 million in 1993. The leading market for U.S. vegetables among CBI countries is the Bahamas, accounting for more than 60 percent. Shipments of fruit juices to CBI beneficiary countries have also expanded steadily in the last five years. U.S. exports of juices to CBI countries have increased from \$23 million in 1989 to \$29 million in 1993. Top CBI markets for U.S. fruit juices are the Bahamas, Panama, Honduras, the Netherlands Antilles, and Costa Rica, which together accounted for about \$21 million of imports in 1993. The bulk of U.S. fruit juice exports to CBI countries include orange, apple, and grape juice.

Fresh and Processed Vegetables, Fruit Juices, and Fresh Fruits were the leading U.S. Hort. Products Destined for CBI Countries in 1993



Improved living standards and increased health consciousness among Caribbean and Central American consumers, are among the reasons for larger U.S. exports to these countries. Also, U.S. firms have been aggressively promoting their product quality directly to consumers and leading buyers. In addition, market promotion

efforts have been directed to the 1 million tourists in the Caribbean, arriving annually from the United States. Reduced import tariffs and elimination of many non-tariff barriers have also increased U.S. wine and fruit shipments to this region.

The Bahamas is by far the largest importer of U.S. horticultural products, accounting for \$83 million in 1993. The Bahamas is followed by Panama (\$33 million), the Netherlands Antilles (\$22 million), Dominican Republic (\$19 million), and Costa Rica (\$17 million). Shipments of U.S. horticultural products to the Caribbean and the Central America region are expected to continue to increase in the coming years, because of overall liberalization of trade policies and more market promotion from U.S. firms.

NAFTA Implications on CBI Countries

The recent implementation of NAFTA, which will eliminate all tariff restrictions for Mexican products entering the United States by the year 2008, will create more competition for horticultural product imports from CBI countries.

On January 1, 1994 NAFTA's Schedule "A" tariff cuts were implemented. Under this schedule, tariffs were eliminated for many Mexican horticultural products that already enjoy duty-free treatment under CBI. Among the more significant horticultural products from CBI countries that will likely be affected by these tariff cuts are cantaloupes (December only), pineapples, ornamental products, fresh peas, papayas, and mangoes (September 1 to May 31 only).

In Schedule "B", items will have their tariffs phased out over the next 5 years, and will be completely eliminated on January 1, 1998. Among the more significant U.S. horticultural product imports from CBI countries to be affected by these tariff cuts are mangoes (June 1 to August 31 on only), tomatoes (July 15 to August 31 only), and frozen broccoli.

For certain Schedule "C" items, such as FCOJ, duties will be completely eliminated by January 1, 2008.

(Samuel Rosa, 202-720-9792)

**TABLE 1. U.S. IMPORTS OF HORTICULTURAL PRODUCTS FROM
CARIBBEAN BASIN INITIATIVE BENEFICIARY COUNTRIES
1991 to 1993**
(Quantity in Metric Tons and Value in \$1,000)

Product	1991		1992		1993		Top Ranking Suppliers
	Quantity	Value	Quantity	Value	Quantity	Value	
Dutiable Fast Track							
Pineapple	108,308	38,581	114,978	42,225	116,165	42,911	Costa Rica, Honduras
FCOJ 1/	5,305	6,180	18,595	23,022	16,238	11,827	Belize, Dom. Republic
Roses	N/A	4,534	N/A	5,992	N/A	5,750	Guatemala, Costa Rica
Avocados	2,510	1,039	7,133	2,818	5,958	2,584	Dom. Republic, Bahamas
Grapfrt Juice 1/ 2/	916	989	1,447	1,895	975	1,236	Belize, Honduras
Grapefruit	7,693	770	10,519	906	11,750	1,140	Bahamas, Dom. Republic
Oranges	4,294	1,168	4,660	1,083	2,982	827	Dom. Republic, Jamaica
Lemons	7,336	551	2,456	200	903	89	Bahamas, Guatemala
Other	N/A	10,051	N/A	5,855	N/A	9,856	
Subtotal	N/A	63,863	N/A	83,996	N/A	76,220	
Dutiable Non-Fast Track							
Frozen Brocoli	10,418	7,063	14,731	10,990	17,101	11,020	Guatemala
Pineapple Juice 1/	8,117	8,319	4,353	6,346	5,280	6,342	Dom. Republic, Costa Rica
Macadamia Nuts	369	2,421	441	3,126	397	3,031	Costa Rica, Guatemala
Processed Pineapple	997	992	1,377	1,364	1,729	887	Costa Rica, Honduras
Frzn Cäuliflower	329	244	783	557	1,362	884	Guatemala
Prepared Papaya	324	227	594	478	732	530	Dom. Republic, Costa Rica
Peas Prep/Frzn 2/	408	897	352	824	42	74	Dom. Republic
Tomate Paste 2/	17	10	1	3	0	0	
Other	N/A	8,310	N/A	9,018	N/A	10,355	
Subtotal	N/A	28,483	N/A	32,706	N/A	33,123	
Not Dutiable 3/							
Fresh Bananas	1,434,587	443,139	1,785,219	521,360	1,804,369	517,045	Costa Rica, Guatemala
Cantaloupe	90,983	28,628	115,504	37,153	134,975	47,568	Costa Rica, Honduras
Live Plants	N/A	12,443	N/A	13,672	N/A	15,018	Costa Rica, Guatemala
Cut Flowers	N/A	11,873	N/A	12,039	N/A	13,312	Costa Rica, Dom. Republic
Yams	10,098	8,276	16,979	8,845	17,433	10,566	Jamaica, Costa Rica
Cassava 2/	15,891	5,797	21,474	7,049	21,263	8,379	Costa Rica, Dom. Republic
Fresh Peas	11,236	8,951	10,395	7,362	9,081	6,451	Guatemala
Frz Bananas/Plantn	5,704	3,112	7,918	4,904	5,318	3,593	Costa Rica, Honduras
Fresh Papayas	1,951	1,800	2,015	1,789	4,422	3,487	Jamaica, Belize
Fresh Plantains	4,983	1,865	5,918	2,201	7,892	3,085	Costa Rica, Honduras
Foliage	N/A	1,284	N/A	1,742	N/A	2,842	Costa Rica, Guatemala
Winter Melon	2,910	643	11,499	2,577	10,519	2,819	Costa Rica, Honduras
Guavas, Mangoes	4,829	3,700	305	169	4,986	2,749	Haiti, Guatemala
Frozen Okra	3,802	2,264	5,312	3,197	4,986	2,534	Guatemala, El Salvador
Coconut	12,055	2,509	11,243	2,261	11,277	2,327	Dom. Republic, Costa Rica
Frozen Peas	916	1,228	166	240	899	1,245	Guatemala, El Salvador
Fresh Okra	40	34	46	27	42	15	Guatemala, Honduras
Fresh Radishes	0	0	0	0	13	6	Guatemala
Fresh Garlic	212	116	323	320	0	0	
Other	N/A	107,277	N/A	122,400	N/A	124,233	
Subtotal	N/A	644,940	N/A	749,304	N/A	770,349	
Total	N/A	737,286	N/A	866,006	N/A	879,692	

1/ Quantity in thousand gallons

2/ Due to the introduction of the Harmonized Tariff Schedule in 1989, and to revised data beginning in 1990, these commodities do not have accurate comparable figures for data prior to 1990.

3/ GSP items plus MFN duty-free items.

Note 1: N/A = not available

Note 2: Totals quantities are not included because of different units used.

Note 3: Totals may not add due to rounding.

TABLE 2. U.S. IMPORTS OF HORTICULTURAL PRODUCTS EXCLUDING FRESH BANANAS AND PLANTAINS FROM CARIBBEAN BASIN BASIN INITIATIVE BENEFICIARY COUNTRIES
 (Value in \$1,000, Calendar Year)

Country	1983 1/	1990	1991	1992	1993	Major Commodities 1993
Costa Rica	12,544	98,022	103,317	124,535	142,643	
CBI Dutiable	1,476	41,591	36,391	40,381	43,056	Pinaapple, Pinaapple Juica, FCOJ
CBI Other	11,068	56,431	66,926	84,154	99,587	Cantaloupa, Cut Flowers, Liva Plants
Guatemala	14,563	45,946	55,103	68,878	66,675	
CBI Dutiable	6,229	8,328	16,762	23,445	25,909	Frozen Brocoli, Rosas, Macadamia Nt.
CBI Other	8,334	37,618	38,341	45,433	40,766	Cantaloupa, Fresh Paas, Liva Plants
Dominican Republic	33,836	51,472	57,519	56,266	51,967	
CBI Dutiable	6,938	16,203	16,724	18,072	14,597	Pinaapple, Pinapla Juica, Avocados
CBI Other	26,898	35,269	40,795	38,194	37,370	Coconut, Cut Flowers, Cantaloupa
Honduras	12,110	23,543	27,123	34,184	39,857	
CBI Dutiable	6,106	7,781	11,063	12,393	11,382	Pinaapple, FCOJ
CBI Other	6,004	15,762	16,060	21,791	28,475	Cantaloupa, Frozen Banana/Plantain
Jamaica	6,069	17,500	15,346	16,879	19,785	
CBI Dutiable	231	4,215	767	1,605	1,736	FCOJ, Orangas
CBI Other	5,838	13,285	14,579	15,274	18,049	Yams, Papayas
Panama	991	4,906	7,320	8,125	9,848	
CBI Dutiable	15	274	52	502	360	FCOJ
CBI Other	976	4,632	7,268	7,623	9,488	Cantaloupa, Wintar Malon
Belize	448	15,979	5,182	18,087	8,969	
CBI Dutiebla	138	15,397	4,935	17,551	7,903	FCOJ, Grepefruit Juice
CBI Other	310	582	247	536	1,066	Papayas, Guavas, Mangoas
El Salvador	1,879	4,461	6,333	6,472	6,223	
CBI Dutiable	961	582	690	695	495	Limas
CBI Other	918	3,879	5,643	5,777	5,728	Winter Melon, Frozen Vegetables
Heiti	4,377	5,963	7,490	261	5,533	
CBI Dutiable	669	1,320	3,176	0	1,451	Citrus Paal
CBI Other	3,708	4,643	4,314	261	4,082	Mangoas, Frozen Mangoas
Bahamas, The	1,230	2,455	3,180	4,674	2,936	
CBI Dutieble	115	1,140	1,509	1,507	1,651	Cucumbers, Grapafruit
CBI Other	1,115	1,315	1,671	3,167	1,285	Wintar Melon, Canteloupe
Nicaragua	92	4	803	1,934	2,736	
CBI Dutiable	43	4	93	152	263	Limas, Onoin
CBI Other	49	0	710	1,782	2,473	Wintar Malon
Trinidad & Tobago	288	822	1,393	1,460	1,510	
CBI Dutiebla	2	11	136	171	128	Fresh Squash, Orange Juica
CBI Other	286	811	1,257	1,289	1,382	Sauces & Preperations, Cut Flowers
St. Lucia	25	2	910	142	293	
CBI Dutiable	0	0	0	109	212	Peppars
CBI Other	25	2	910	33	81	Seuces & Praparetons
Dominica	1	739	302	186	124	
CBI Dutiebla	0	295	9	0	17	
CBI Other	1	444	293	186	107	Cut Flowers

TABLE 2 U.S. IMPORTS OF HORTICULTURAL PRODUCTS, EXCLUDING FRESH BANANAS AND PLANTAINS FROM CARIBBEAN BASIN INITIATIVE BENEFICIARY COUNTRIES
 (Value in \$1,000, Calendar Year)
 (Continued)

Country	1983 2/	1990	1991	1992	1993	Major Commodities 1993
Grenada	0	144	207	185	119	
CBI Dutiable	0	32	15	36	40	Avocados
CBI Other	0	112	192	149	79	Guavas, Mangoes
Montserrat	0	17	3	16	114	
CBI Dutiable	0	0	0	10	110	Frozen Broccoli
CBI Other	0	17	3	6	4	Cut Flowers
Berbados	22	76	252	33	106	
CBI Dutiable	0	6	0	0	0	
CBI Other	22	70	252	33	106	Sauces & Preparations
St. Vincent	152	85	166	89	73	
CBI Dutiable	0	0	0	64	23	Avocados
CBI Other	152	85	166	25	50	Cut Flowers
Netherlands Antilles 2/	29	34	18	14	23	
CBI Dutiable	20	2	0	0	2	Wine
CBI Other	9	32	8	14	21	Food Preparations
St. Christopher & Nevis	0	22	43	15	17	
CBI Dutiable	0	22	24	9	8	Grapefruit Juice
CBI Other	0	0	19	6	9	Cut Flowers
Guyana	1	12	13	8	9	
CBI Dutiable	0	7	0	0	0	
CBI Other	1	5	13	8	9	Seucess & Preperations
Antigua & Barbuda	1	33	249	0	2	
CBI Dutiable	0	12	0	0	0	
CBI Other	1	21	249	0	2	
British Virgin Island	0	6	6	5	0	
CBI Dutiable	0	0	0	0	0	
CBI Other	0	6	6	5	0	
CBI Beneficiaries	88,658	272,243	292,278	342,448	359,562	
CBI Dutiable	22,943	97,222	92,346	116,702	109,343	
CBI Other	65,715	175,021	199,932	225,746	250,219	

1/ Imports prior to enactment of CBERA.

2/ These figures include imports from Aruba, which are negligible.

Note 1: Totals may not add due to rounding. Also, totals may not match those in Table 1, which exclude some products other than bananas and plantains.

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
ANTIGUA AND BARBUDA					
FRESH CITRUS	0	3	0	11	0
FRESH DECIDUOUS FRUIT	137	41	40	38	8
OTHER FRESH FRUIT	479	105	10	0	0
FRESH MELONS	0	0	8	0	0
PROCESSED FRUIT	79	77	36	44	43
MISC. FRUIT PREPARATIONS	54	172	128	37	101
OLIVES	0	3	0	0	0
DRIED FRUIT	98	15	21	8	37
FRUIT & VEGETABLE JUICE	791	930	908	1,004	926
FRESH VEGIES X POTATOES	442	737	486	676	156
FRESH POTATOES	82	161	21	11	41
VEGETABLES, PREP/PRES	3,506	2,255	2,275	1,134	1,005
FROZEN VEGETABLES	262	610	533	19	117
DRIED/DEHYDRATED VEGETAB	15	6	15	3	3
TREE NUTS	42	89	132	40	0
WINE	393	240	308	265	328
NURSERY PROD X CUT FLOWERS	56	51	98	42	0
CUT FLOWERS	0	0	0	23	0
FRUIT & VEGETABLE MISC	1,528	1,280	738	745	1,960
TOTAL	7,964	6,775	5,757	4,100	4,725
ARUBA					
FRESH CITRUS	26	13	71	5	27
FRESH DECIDUOUS FRUIT	112	60	91	57	50
OTHER FRESH FRUIT	9	4	0	0	0
FROZEN FRUIT	0	13	0	7	12
PROCESSED FRUIT	109	59	173	144	89
MISC. FRUIT PREPARATIONS	195	490	439	207	166
OLIVES	90	27	0	0	0
DRIED FRUIT	163	38	38	73	38
FRUIT & VEGETABLE JUICE	891	1,095	1,268	2,021	1,592
FRESH VEGIES X POTATOES	142	444	880	785	832
FRESH POTATOES	66	12	0	3	9
VEGETABLES, PREP/PRES	1,620	1,673	1,663	1,374	1,527
FROZEN VEGETABLES	1,045	219	234	156	238
DRIED/DEHYDRATED VEGET	147	251	43	63	14
TREE NUTS	177	237	224	360	223
WINE	218	238	354	309	795
NURSERY PROD X CUT FLOWERS	168	181	400	254	110

CUT FLOWERS	30	3	0	56	0
FRUIT & VEGETABLE MISC	1,897	2,624	3,528	3,312	3,074
TOTAL	7,105	7,681	9,406	9,186	8,796

BAHAMAS, THE

FRESH CITRUS	80	30	23	0	22
FRESH DECIDUOUS FRUIT	594	527	428	21	100
OTHER FRESH FRUIT	201	87	109	26	83
FRESH MELONS	32	12	6	26	0
FROZEN FRUIT	0	9	0	0	0
PROCESSED FRUIT	261	353	256	174	127
MISC. FRUIT PREPARATIONS	122	623	515	1,103	576
DRIED FRUIT	292	112	0	24	65
FRUIT & VEGETABLE JUICE	6,162	7,075	7,052	6,366	7,191
FRESH VEGIES X POTATOES	4,643	5,915	5,731	7,488	17,839
FRESH POTATOES	368	181	200	246	198
VEGETABLES, PREP/PRES	6,236	4,982	7,826	9,809	23,365
FROZEN VEGETABLES	6,955	7,421	4,312	6,560	378
DRIED/DEHYDRATED VEGETAB	491	573	523	636	1,075
TREE NUTS	197	158	203	135	85
WINE	1,274	1,593	1,512	1,763	2,337
HOPS	31	56	61	30	47
NURSERY PROD X CUT FLOWERS	1,214	1,742	847	888	1,149
CUT FLOWERS	5	14	5	10	14
FRUIT & VEGETABLE MISC	16,581	16,100	13,414	21,915	28,002
TOTAL	45,739	47,563	43,023	57,220	82,653

BARBADOS

FRESH CITRUS	36	100	88	45	0
FRESH DECIDUOUS FRUIT	239	554	443	121	115
OTHER FRESH FRUIT	40	83	22	18	8
FRESH MELONS	0	12	4	0	0
FROZEN FRUIT	0	0	0	35	0
PROCESSED FRUIT	53	17	38	24	24
MISC. FRUIT PREPARATIONS	222	564	276	208	80
DRIED FRUIT	198	32	47	9	7
FRUIT & VEGETABLE JUICE	837	490	979	329	845
FRESH VEGIES X POTATOES	173	342	480	126	287
FRESH POTATOES	343	139	101	51	177
VEGETABLES, PREP/PRES	1,409	732	661	1,024	569
FROZEN VEGETABLES	586	256	242	111	46
DRIED/DEHYDRATED VEGETAB	24	39	21	52	32
TREE NUTS	97	186	136	71	173
WINE	366	286	443	359	457
HOPS	8	9	21	0	27

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES**
1989-1993 (Value in 1,000)

	1989	1990	1991	1992	1993
NURSERY PROD X CUT FLOWERS	0	9	4	11	45
CUT FLOWERS	0	0	3	0	0
FRUIT & VEGETABLE MISC	2,074	2,253	1,727	765	1,599
TOTAL	6,705	6,103	5,736	3,359	4,491
BELIZE					
FRESH CITRUS	0	0	15	0	0
FRESH DECIDUOUS FRUIT	150	179	151	145	170
OTHER FRESH FRUIT	77	0	0	34	26
FROZEN FRUIT	0	4	0	0	0
PROCESSED FRUIT	58	34	15	27	43
MISC. FRUIT PREPARATIONS	30	4	36	90	22
DRIED FRUIT	67	7	0	10	21
FRUIT & VEGETABLE JUICE	43	29	67	74	51
FRESH VEGIES X POTATOES	119	218	441	328	316
FRESH POTATOES	19	136	270	57	93
VEGETABLES, PREP/PRES	1,636	1,347	1,640	2,607	2,930
FROZEN VEGETABLES	88	37	52	314	52
DRIED/DEHYDRATED VEGETAB	0	35	23	25	34
TREE NUTS	139	0	75	70	5
WINE	224	114	137	180	229
HOPS	0	0	0	48	42
NURSERY PROD X CUT FLOWERS	2	70	0	28	0
CUT FLOWERS	15	0	0	0	0
FRUIT & VEGETABLE MISC	2,280	909	947	1,624	1,576
TOTAL	4,947	3,123	3,869	5,661	5,610
COSTA RICA					
FRESH CITRUS	0	33	9	17	0
FRESH DECIDUOUS FRUIT	1,945	3,243	4,280	4,463	6,535
OTHER FRESH FRUIT	11	0	16	8	62
FRESH MELONS	37	120	157	0	0
FROZEN FRUIT	0	23	0	44	21
PROCESSED FRUIT	229	418	535	797	1,370
MISC. FRUIT PREPARATIONS	464	534	467	541	802
OLIVES	21	0	0	7	0
DRIED FRUIT	147	72	81	114	297
FRUIT & VEGETABLE JUICE	523	633	974	1,449	2,899

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
FRESH VEGIES X POTATOES	41	33	216	204	171
VEGETABLES, PREP/PRES	688	189	293	798	1,347
FROZEN VEGETABLES	0	94	99	252	321
DRIED/DEHYDRATED VEGETAB	428	529	406	491	539
TREE NUTS	152	74	320	189	355
WINE	114	361	226	110	294
HOPS	119	0	69	356	183
NURSERY PROD X CUT FLOWERS	237	392	480	382	433
CUT FLOWERS	9	0	18	0	13
FRUIT & VEGETABLE MISC	1,763	938	1,628	1,211	1,358
TOTAL	6,928	7,686	10,274	11,433	17,000

DOMINICA

FRESH CITRUS	6	8	6	0	0
FRESH DECIDUOUS FRUIT	0	4	18	0	0
OTHER FRESH FRUIT	16	0	10	0	0
MISC. FRUIT PREPARATIONS	43	76	89	63	15
FRUIT & VEGETABLE JUICE	3	0	11	41	0
FRESH VEGIES X POTATOES	13	29	13	6	0
VEGETABLES, PREP/PRES	233	139	40	234	178
FROZEN VEGETABLES	0	31	0	0	0
DRIED/DEHYDRATED VEGETAB	7	18	0	0	22
TREE NUTS	3	0	0	0	0
WINE	93	33	99	22	0
NURSERY PROD X CUT FLOWERS	2	0	0	0	0
FRUIT & VEGETABLE MISC	72	152	82	92	42
TOTAL	491	490	368	458	257

DOMINICAN REPUBLIC

FRESH CITRUS	8	20	23	24	6
FRESH DECIDUOUS FRUIT	1,356	762	1,270	2,198	3,088
OTHER FRESH FRUIT	9	0	4	0	0
FROZEN FRUIT	0	0	0	0	26
PROCESSED FRUIT	318	102	194	207	290
MISC. FRUIT PREPARATIONS	615	608	436	468	815
OLIVES	490	10	0	16	8
DRIED FRUIT	688	383	459	665	763
FRUIT & VEGETABLE JUICE	400	500	423	1,151	1,841

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
FRESH VEGIES X POTATOES	82	393	792	500	172
FRESH POTATOES	27	24	36	25	4
VEGETABLES, PREP/PRES	786	516	586	946	4,152
FROZEN VEGETABLES	72	201	3	103	40
DRIED/DEHYDRATED VEGETAB	450	566	430	741	771
TREE NUTS	316	191	223	168	1,045
WINE	165	150	197	226	318
HOPS	271	575	1,201	872	648
NURSERY PROD X CUT FLOWERS	27	52	13	7	29
CUT FLOWERS	16	0	0	12	76
FRUIT & VEGETABLE MISC	851	881	1,202	2,544	5,525
TOTAL	6,947	5,934	7,492	10,873	19,617
EL SALVADOR					
FRESH DECIDUOUS FRUIT	871	1,483	3,219	2,556	2,015
OTHER FRESH FRUIT	0	0	3	0	6
FRESH MELONS	0	0	56	4	0
PROCESSED FRUIT	116	50	70	161	340
MISC. FRUIT PREPARATIONS	55	13	334	65	17
OLIVES	0	0	4	5	3
DRIED FRUIT	5	76	54	51	67
FRUIT & VEGETABLE JUICE	229	17	42	131	66
FRESH VEGIES X POTATOES	8	0	54	81	690
FRESH POTATOES	0	0	0	0	22
VEGETABLES, PREP/PRES	1,004	818	826	863	724
FROZEN VEGETABLES	25	0	0	198	130
DRIED/DEHYDRATED VEGETAB	211	216	339	255	369
TREE NUTS	7	0	5	97	10
WINE	41	26	147	235	233
HOPS	0	129	184	98	186
NURSERY PROD X CUT FLOW	2	0	0	23	45
CUT FLOWERS	0	0	0	11	0
FRUIT & VEGETABLE MISC	527	951	763	1,213	1,573
TOTAL	3,101	3,779	6,100	6,047	6,496
GRENADE					
FRESH CITRUS	0	4	16	0	0
FRESH DECIDUOUS FRUIT	26	30	30	6	18

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
OTHER FRESH FRUIT	4	3	5	0	0
PROCESSED FRUIT	7	0	18	0	4
MISC. FRUIT PREPARATIONS	70	103	153	67	26
OLIVES	40	0	0	0	0
DRIED FRUIT	43	57	58	0	9
FRUIT & VEGETABLE JUICE	179	178	80	67	48
FRESH VEGIES X POTATOES	54	101	112	7	15
FRESH POTATOES	15	13	6	0	0
VEGETABLES, PREP/PRES	810	550	807	419	271
FROZEN VEGETABLES	0	4	0	0	0
DRIED/DEHYDRATED VEGETAB	0	0	3	0	40
TREE NUTS	5	3	8	6	0
WINE	44	240	451	52	97
HOPS	0	13	21	16	16
NURSERY PROD X CUT FLOW	0	5	0	0	0
FRUIT & VEGETABLE MISC	40	297	269	135	121
TOTAL	1,337	1,601	2,037	775	665

GUATEMALA

FRESH CITRUS	0	75	0	0	0
FRESH DECIDUOUS FRUIT	1,021	969	2,627	1,850	4,436
OTHER FRESH FRUIT	0	0	3	0	21
FRESH MELONS	0	0	20	0	0
FROZEN FRUIT	16	0	29	37	0
PROCESSED FRUIT	297	168	358	819	610
MISC. FRUIT PREPARATIONS	154	70	240	688	430
OLIVES	0	0	0	0	8
DRIED FRUIT	55	128	245	371	545
FRUIT & VEGETABLE JUICE	193	128	421	625	517
FRESH VEGIES X POTATOES	0	46	10	258	201
FRESH POTATOES	0	0	0	65	61
VEGETABLES, PREP/PRES	125	220	441	329	757
FROZEN VEGETABLES	565	330	167	211	425
DRIED/DEHYDRATED VEGETAB	267	329	351	454	541
TREE NUTS	222	103	26	217	311
WINE	74	36	189	208	196
HOPS	134	181	380	587	304
NURSERY PROD X CUT FLOW	233	722	920	1,121	975

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
CUT FLOWERS	9	0	62	166	0
FRUIT & VEGETABLE MISC	755	1,086	1,711	2,988	3,415
TOTAL	4,120	4,591	8,200	10,994	13,753
GUYANA					
FRESH DECIDUOUS FRUIT	12	8	7	80	321
OTHER FRESH FRUIT	0	0	0	0	159
FROZEN FRUIT	0	0	0	0	4
MISC. FRUIT PREPARATIONS	0	3	7	135	28
FRUIT & VEGETABLE JUICE	0	0	0	13	28
FRESH VEGIES X POTATOES	0	58	133	94	141
VEGETABLES, PREP/PRES	7	14	126	28	74
FROZEN VEGETABLES	6	0	10	24	80
TREE NUTS	15	0	0	0	0
WINE	4	5	4	0	0
HOPS	9	5	0	0	5
FRUIT & VEGETABLE MISC	246	108	214	383	317
TOTAL	299	201	501	757	1,157
HAITI					
FRESH CITRUS	0	0	4	0	0
FRESH DECIDUOUS FRUIT	166	154	71	14	42
OTHER FRESH FRUIT	3	16	0	0	0
PROCESSED FRUIT	19	13	12	0	13
MISC. FRUIT PREPARATIONS	125	339	391	224	100
OLIVES	23	0	0	0	0
DRIED FRUIT	3	0	22	0	9
FRUIT & VEGETABLE JUICE	572	509	472	22	8
FRESH VEGIES X POTATOES	176	157	78	62	5
VEGETABLES, PREP/PRES	2,209	2,058	1,000	469	451
FROZEN VEGETABLES	3	6	0	0	0
DRIED/DEHYDRATED VEGETAB	199	28	56	133	40
TREE NUTS	9	0	0	0	0
WINE	228	267	198	0	61
HOPS	81	47	73	0	0
NURSERY PROD X CUT FLOW	65	7	18	0	0
CUT FLOWERS	20	0	0	0	0
FRUIT & VEGETABLE MISC	803	1,046	640	517	219

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
TOTAL	4,704	4,647	3,035	1,441	948
HONDURAS					
FRESH CITRUS	2	0	4	0	0
FRESH DECIDUOUS FRUIT	902	916	924	1,508	2,527
FROZEN FRUIT	0	8	0	0	8
PROCESSED FRUIT	84	121	110	1,013	789
MISC. FRUIT PREPARATIONS	98	0	32	492	840
OLIVES	4	0	55	0	3
DRIED FRUIT	57	138	219	332	483
FRUIT & VEGETABLE JUICE	1,558	703	678	2,104	3,589
FRESH VEGIES X POTATOES	72	13	121	187	578
FRESH POTATOES	13	0	3	7	27
VEGETABLES, PREP/PRES	986	580	1,927	1,903	1,346
FROZEN VEGETABLES	3	18	126	172	313
DRIED/DEHYDRATED VEGETAB	362	433	306	223	176
TREE NUTS	0	15	24	31	58
WINE	31	70	93	131	105
HOPS	0	173	4	294	153
NURSERY PROD X CUT FLOW	34	0	36	0	7
CUT FLOWERS	0	3	0	0	0
FRUIT & VEGETABLE MISC	910	348	938	2,480	1,683
TOTAL	5,116	3,539	5,600	10,877	12,685
JAMAICA & DEP					
FRESH CITRUS	46	0	0	0	0
FRESH DECIDUOUS FRUIT	0	3	0	0	3
OTHER FRESH FRUIT	0	10	0	0	13
FROZEN FRUIT	10	0	0	0	0
PROCESSED FRUIT	59	12	15	0	22
MISC. FRUIT PREPARATIONS	126	14	84	67	71
DRIED FRUIT	112	121	142	88	53
FRUIT & VEGETABLE JUICE	550	592	846	403	880
FRESH VEGIES X POTATOES	386	228	861	1,078	1,134
FRESH POTATOES	102	29	55	35	71
VEGETABLES, PREP/PRES	250	193	262	307	659
FROZEN VEGETABLES	592	573	428	605	439
DRIED/DEHYDRATED VEGETAB	487	349	276	262	321

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
TREE NUTS	131	164	193	192	186
WINE	344	327	286	172	336
HOPS	158	393	253	287	467
NURSERY PROD X CUT FLOW	199	12	53	0	31
CUT FLOWERS	58	0	0	0	0
FRUIT & VEGETABLE MISC	1,636	1,819	1,306	943	1,870
TOTAL	5,246	4,839	5,060	4,439	6,556
MONTSERRAT					
PROCESSED FRUIT	0	5	3	0	0
MISC. FRUIT PREPARATIONS	45	7	31	25	0
FRUIT & VEGETABLE JUICE	237	191	136	177	155
FRESH VEGIES X POTATOES	0	0	6	0	0
VEGETABLES, PREP/PRES	135	83	42	51	135
FROZEN VEGETABLES	16	3	0	0	0
DRIED/DEHYDRATED VEGETAB	0	3	0	0	0
TREE NUTS	6	12	0	0	3
WINE	12	18	155	3	19
FRUIT & VEGETABLE MISC	39	106	58	107	144
TOTAL	490	428	431	363	456
NETHERLANDS ANTILLES ARUBARUBA					
FRESH CITRUS	79	43	68	66	66
FRESH DECIDUOUS FRUIT	722	663	544	716	532
OTHER FRESH FRUIT	842	502	101	28	140
FRESH MELONS	4	0	0	0	0
FROZEN FRUIT	0	14	17	29	9
PROCESSED FRUIT	264	209	187	295	240
MISC. FRUIT PREPARATIONS	1,004	1,234	1,387	852	1,032
DRIED FRUIT	664	583	428	620	335
FRUIT & VEGETABLE JUICE	2,982	3,404	3,334	3,558	3,301
FRESH VEGIES X POTATOES	1,349	923	579	1,785	1,369
FRESH POTATOES	79	231	3	3	3
VEGETABLES, PREP/PRES	5,886	6,317	4,161	3,063	3,551
FROZEN VEGETABLES	1,515	2,879	1,396	336	471
DRIED/DEHYDRATED VEGETAB	393	541	496	532	104
TREE NUTS	203	374	391	379	478
WINE	1,320	2,148	2,327	3,556	1,615

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
HOPS	24	33	31	35	99
NURSERY PROD X CUT FLOW	747	581	351	518	268
CUT FLOWERS	59	11	50	27	18
GINSENG	0	0	4	0	0
FRUIT & VEGETABLE MISC	8,106	8,540	9,237	7,319	7,906
TOTAL	26,242	29,230	25,092	23,717	21,537
NICARAGUA					
FRESH DECIDUOUS FRUIT	0	153	371	755	360
FROZEN FRUIT	0	0	10	0	0
PROCESSED FRUIT	0	201	33	5	3
MISC. FRUIT PREPARATIONS	0	0	26	13	0
OLIVES	0	3	0	10	0
DRIED FRUIT	0	0	93	65	32
FRUIT & VEGETABLE JUICE	0	29	77	0	0
FRESH VEGIES X POTATOES	0	0	75	35	5
VEGETABLES, PREP/PRES	271	157	1,493	118	94
FROZEN VEGETABLES	0	10	0	6	0
DRIED/DEHYDRATED VEGETAB	0	0	16	7	4
TREE NUTS	0	3	7	18	0
WINE	0	9	78	27	0
HOPS	0	239	208	195	228
NURSERY PROD X CUT FLOW	0	0	0	8	0
FRUIT & VEGETABLE MISC	0	164	3,551	5,809	2,296
TOTAL	271	968	6,038	7,071	3,022
PANAMA					
FRESH CITRUS	5	0	8	11	0
FRESH DECIDUOUS FRUIT	3,794	4,721	4,132	3,685	3,895
OTHER FRESH FRUIT	164	5	0	31	86
FRESH MELONS	7	0	0	0	0
FROZEN FRUIT	0	23	5	3	16
PROCESSED FRUIT	1,519	1,762	1,346	1,472	1,571
MISC. FRUIT PREPARATIONS	499	607	200	197	259
OLIVES	26	27	14	0	16
DRIED FRUIT	1,133	1,151	1,000	1,044	1,109
FRUIT & VEGETABLE JUICE	3,575	5,225	6,493	5,962	3,693
FRESH VEGIES X POTATOES	906	1,350	522	260	224

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
FRESH POTATOES	8	10	11	7	14
VEGETABLES, PREP/PRES	4,211	2,626	3,199	2,944	4,395
FROZEN VEGETABLES	269	225	314	159	296
DRIED/DEHYDRATED VEGETAB	1,978	4,236	1,594	1,503	904
TREE NUTS	816	635	506	828	989
WINE	406	259	264	492	890
HOPS	189	45	0	0	0
NURSERY PROD X CUT FLOW	52	205	80	3	5
CUT FLOWERS	17	46	4	15	4
GINSENG	0	0	0	0	11
FRUIT & VEGETABLE MISC	6,465	4,837	6,119	8,938	14,339
TOTAL	26,039	27,995	25,811	27,554	32,716
ST. CHRISTOPHER-NEVIS-ANGUILLA					
FRESH CITRUS	0	0	8	0	0
FRESH DECIDUOUS FRUIT	8	31	13	0	0
OTHER FRESH FRUIT	10	33	0	0	15
PROCESSED FRUIT	14	18	13	0	4
MISC. FRUIT PREPARATIONS	22	113	376	205	24
DRIED FRUIT	54	16	13	5	3
FRUIT & VEGETABLE JUICE	232	136	77	87	73
FRESH VEGIES X POTATOES	172	42	32	24	17
FRESH POTATOES	0	4	0	0	0
VEGETABLES, PREP/PRES	582	222	260	220	243
FROZEN VEGETABLES	38	10	8	56	3
DRIED/DEHYDRATED VEGETAB	20	5	16	0	12
TREE NUTS	2	15	7	9	13
WINE	48	72	90	39	94
HOPS	4	0	9	0	7
NURSERY PROD X CUT FLOW	6	5	0	3	23
FRUIT & VEGETABLE MISC	755	462	765	1,011	929
TOTAL	1,967	1,184	1,687	1,659	1,460
ST. LUCIA					
FRESH CITRUS	13	0	13	0	0
FRESH DECIDUOUS FRUIT	30	37	36	33	3
OTHER FRESH FRUIT	47	41	57	0	112
FROZEN FRUIT	12	0	0	0	0

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
PROCESSED FRUIT	58	0	3	16	30
MISC. FRUIT PREPARATIONS (730X)	65	114	275	140	60
OLIVES	0	0	0	0	3
DRIED FRUIT	66	37	23	4	19
FRUIT & VEGETABLE JUICE	1,418	1,408	1,485	1,448	1,119
FRESH VEGIES X POTATOES	348	382	412	281	247
FRESH POTATOES	12	33	80	11	53
VEGETABLES, PREP/PRES	759	490	369	289	504
FROZEN VEGETABLES	163	203	199	123	29
DRIED/DEHYDRATED VEGETAB	26	13	19	44	52
TREE NUTS	35	93	33	58	172
WINE	513	461	712	764	763
HOPS	21	63	35	27	3
NURSERY PROD X CUT FLOW	0	6	13	15	0
CUT FLOWERS	0	0	0	0	4
FRUIT & VEGETABLE MISC	1,241	929	992	1,248	1,863
TOTAL	4,827	4,310	4,756	4,501	5,036
ST. VINCENT AND THE GRENADINES					
FRESH DECIDUOUS FRUIT	17	48	35	26	15
OTHER FRESH FRUIT	9	0	0	0	13
PROCESSED FRUIT	0	51	0	0	0
MISC. FRUIT PREPARATIONS	88	209	87	81	121
DRIED FRUIT	23	5	0	0	5
FRUIT & VEGETABLE JUICE	773	148	208	81	84
FRESH VEGIES X POTATOES	8	3	6	0	14
FRESH POTATOES	0	0	4	0	0
VEGETABLES, PREP/PRES	1,075	1,024	1,524	1,165	950
FROZEN VEGETABLES	5	0	0	0	0
DRIED/DEHYDRATED VEGETAB	2	0	8	0	0
TREE NUTS	2	0	3	0	0
WINE	85	45	108	65	49
HOPS	0	14	32	22	10
FRUIT & VEGETABLE MISC	195	254	377	350	313
TOTAL	2,282	1,801	2,392	1,790	1,574
TRINIDAD AND TOBAGO					
FRESH CITRUS	0	4	48	0	0

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
FRESH DECIDUOUS FRUIT	7	1,664	600	670	693
OTHER FRESH FRUIT	0	47	25	56	69
PROCESSED FRUIT	0	108	61	134	18
MISC. FRUIT PREPARATIONS	59	113	337	84	172
OLIVES	7	25	31	0	0
DRIED FRUIT	166	421	441	564	179
FRUIT & VEGETABLE JUICE	200	296	219	539	241
FRESH VEGIES X POTATOES	1,239	2,122	2,066	1,866	947
FRESH POTATOES	0	23	0	100	0
VEGETABLES, PREP/PRES	704	774	969	946	508
FROZEN VEGETABLES	39	246	16	110	59
DRIED/DEHYDRATED VEGETAB	135	222	292	110	216
TREE NUTS	742	591	455	710	594
WINE	32	23	83	88	109
HOPS	49	19	37	44	99
NURSERY PROD X CUT FLOW	53	3	93	11	0
CUT FLOWERS	0	4	0	0	4
FRUIT & VEGETABLE MISC	381	540	913	1,479	1,809
TOTAL	3,813	7,245	6,686	7,511	5,717
BRITISH VIRGIN ISLANDS					
FRESH CITRUS	157	91	0	0	0
OTHER FRESH FRUIT	76	0	0	0	0
FROZEN FRUIT	0	0	3	0	0
PROCESSED FRUIT	5	15	0	0	0
MISC. FRUIT PREPARATIONS	112	66	30	7	28
FRUIT & VEGETABLE JUICE	273	466	179	72	154
FRESH VEGIES X POTATOES	623	694	594	1,322	1,243
FRESH POTATOES	2	0	0	0	0
VEGETABLES, PREP/PRES	286	1,274	132	54	76
FROZEN VEGETABLES	69	174	936	12	13
DRIED/DEHYDRATED VEGETAB	20	0	0	0	0
WINE	221	351	174	239	142
NURSERY PROD X CUT FLOWERS	65	156	28	39	74
FRUIT & VEGETABLE MISC	2,865	4,128	1,101	1,077	1,543
TOTAL	4,774	7,415	3,177	2,822	3,273
TOTAL CBI					

**TABLE 3. U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO
CARIBBEAN BASIN INITIATIVE COUNTRIES
1989-1993 (Value in 1,000)**

	1989	1990	1991	1992	1993
FRESH CITRUS	458	424	404	179	121
FRESH DECIDUOUS FRUIT	12,108	16,249	19,333	18,943	24,924
OTHER FRESH FRUIT	1,996	934	364	202	812
FRESH MELONS	80	144	251	29	0
FROZEN FRUIT	38	94	64	154	97
PROCESSED FRUIT	3,548	3,792	3,476	5,332	5,629
MISC. FRUIT PREPARATIONS	4,265	6,077	6,374	6,059	5,787
OLIVES	700	94	104	39	40
DRIED FRUIT	4,036	3,392	3,384	4,047	4,075
FRUIT & VEGETABLE JUICE	22,621	24,184	26,428	27,723	29,302
FRESH VEGIES X POTATOES	10,997	14,232	14,699	17,452	26,604
FRESH POTATOES	1,136	996	790	621	774
VEGETABLES, PREP/PRES	35,415	29,232	32,521	31,092	49,813
FROZEN VEGETABLES	12,317	13,550	9,076	9,529	3,449
DRIED/DEHYDRATED VEGETAB	5,663	8,393	5,234	5,534	5,267
TREE NUTS	3,318	2,944	2,971	3,578	4,698
WINE	6,248	7,374	8,633	9,305	9,470
HOPS	1,100	1,993	2,621	2,911	2,523
NURSERY PROD X CUT FLOW	3,161	4,198	3,433	3,352	3,195
CUT FLOWERS	238	81	142	319	131
GINSENG	0	0	4	0	11
FRUIT & VEGETABLE MISC	52,012	50,754	52,219	68,203	83,475
TOTAL	181,454	189,128	192,528	214,608	260,200

1/ Revised for the entire period (1989 to 1993)

Source: U.S. Bureau of the Census

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 94

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
		COUNTRY	LAST	CURR	MO	YR	TDT	LAST	CURR	MO	YR	TDT	LAST
FRESH FRUIT													
FR APPLES (JUL)	MT	8,806	5,753	104,163	86,854	113,733	4,532	4,025	70,941	68,057	75,230		
MEXICO		14,760	19,216	57,318	89,772	99,364	5,554	11,189	28,295	50,646	43,551		
CANADA		8,021	8,063	63,032	60,079	83,089	4,808	6,051	42,291	45,094	56,313		
HONG KONG		4,659	6,416	37,351	45,181	47,234	2,741	3,305	21,413	25,501	27,786		
OTHER		8,785	11,154	130,827	174,105	145,925	5,498	6,614	83,462	95,330	92,820		
Subtotal:-----		45,231	50,602	392,691	454,992	489,346	25,132	31,184	246,603	284,628	300,700		
FR PEARS (JUL)	MT	1,808	2,797	30,768	33,396	34,899	1,397	2,062	21,731	22,454	25,100		
MEXICO		3,831	6,136	26,969	37,422	34,222	2,092	2,870	13,375	18,805	17,370		
TAIWAN		1,385	1,196	5,176	4,761	6,157	948	662	3,567	2,821	1,415		
SWEDEN		163	0	5,758	6,214	5,790	70	0	2,636	2,232	2,657		
OTHER		1,037	339	18,520	20,305	19,289	645	181	11,167	11,231	11,673		
Subtotal:-----		8,224	10,468	87,192	102,098	100,358	5,152	5,776	52,476	57,543	60,944		
APRICOTS (MAY)	MT	5	0	3,085	3,030	3,091	8	0	3,498	4,043	3,508		
CANADA		10	0	497	1,515	497	8	0	394	1,183	394		
MEXICO		0	0	464	317	464	0	0	1,263	955	1,263		
EU 12		0	0	426	224	426	0	0	1,118	748	1,118		
UNITED KINGDOM		0	0	426	322	440	0	0	599	467	630		
OTHER		0	0	426	322	440	0	0	599	467	630		
Subtotal:-----		15	0	4,472	5,184	4,492	16	0	5,755	6,647	5,794		
FR CHERRIES (MAY)	MT	18	0	12,162	12,467	12,162	10	0	61,991	77,333	61,991		
JAPAN		0	0	9,600	6,235	9,607	0	0	18,087	13,376	18,087		
CANADA		216	39	3,462	1,941	3,521	318	156	11,305	11,520	11,520		
EU 12		0	0	2,634	1,241	2,634	0	0	8,726	4,592	8,726		
UNITED KINGDOM		0	0	2,553	1,847	2,553	0	0	5,643	5,550	5,643		
HONG KONG		0	0	2,081	2,140	2,082	0	0	4,209	4,705	4,211		
TAIWAN		11	3	1,070	784	1,073	26	8	3,365	2,623	3,381		
OTHER		0	0	4,472	5,184	4,492	16	0	5,755	6,647	5,794		
Subtotal:-----		246	42	30,927	25,413	30,998	354	164	104,600	110,653	104,852		
PEACH-NECTRN (MAY)	MT	242	186	51,276	48,236	51,461	351	241	43,898	44,981	44,175		
CANADA		29	0	8,975	6,190	8,975	26	0	4,857	3,361	4,857		
MEXICO		0	0	5,476	4,194	5,476	0	0	5,178	4,269	5,178		
TAIWAN		0	0	3,675	4,430	3,773	11	0	3,326	3,877	3,400		
OTHER		20	0	4,472	5,184	4,492	16	0	57,260	56,489	57,610		
Subtotal:-----		291	186	69,403	63,050	69,686	388	241	57,260	56,489	57,610		
PLUM-PRUNES (MAY)	MT	224	225	25,351	23,223	25,485	322	308	20,578	23,301	20,756		
CANADA		0	0	21,848	13,733	21,848	0	0	15,071	12,198	15,071		
TAIWAN		0	0	8,470	7,995	8,470	0	0	6,609	6,825	6,609		
HONG KONG		0	0	5,771	2,191	5,771	0	0	4,574	2,137	4,574		
EU 12		0	0	5,154	2,105	5,154	0	0	4,172	1,388	4,172		
UNITED KINGDOM		0	0	6,114	7,468	6,115	85	0	4,842	5,657	4,845		
OTHER		116	0	4,472	5,184	4,492	16	0	50,118	51,855	51,855		
Subtotal:-----		340	240	67,554	54,609	67,689	407	322	51,674	50,118	51,855		
FR AVOCADOS (OCT)	MT	682	464	896	1,455	5,269	814	468	1,074	1,344	5,644		
EU 12		472	39	1,329	787	3,165	427	54	1,305	927	4,492		
CANADA		546	101	1,031	725	2,234	663	126	1,359	691	3,387		
JAPAN		429	128	505	537	5,832	499	167	534	500	2,734		
FRANCE		220	134	358	447	1,854	274	127	499	404	2,086		
UNITED KINGDOM		124	58	129	96	1,517	163	58	173	133	701		
OTHER		1,825	662	3,384	3,064	14,186	2,067	707	3,911	3,095	14,224		
FR KIWIFRUIT (OCT)	MT	1,260	813	2,492	1,649	3,554	1,917	1,462	3,969	2,925	5,702		
TAIWAN		527	476	2,186	2,618	3,387	623	616	2,776	3,179	4,298		
KOREA, REPUBLIC		142	344	353	1,324	538	225	649	538	2,451	798		
OTHER		348	184	761	1,157	880	557	265	1,054	1,566	1,274		
Subtotal:-----		2,278	1,818	5,792	6,749	8,359	3,323	2,993	8,337	10,120	12,071		
FRESH GRAPES (MAY)	MT	1,164	1,070	103,364	109,919	104,410	1,503	1,629	102,495	121,391	103,958		
CANADA		0	0	19,431	18,018	19,431	0	0	21,566	20,938	21,566		
HONG KONG		0	20	14,944	13,330	14,944	0	21	16,199	17,239	16,199		
TAIWAN		97	780	48,341	63,550	48,367	109	561	62,344	77,293	62,401		
OTHER		1,261	1,870	186,080	204,817	187,152	1,612	2,210	202,604	236,860	204,124		
FR STRAWBRIS (JAN)	MT	3,775	3,938	5,466	6,314	35,611	5,600	6,202	9,081	10,891	49,034		
CANADA		0	0	17	0	3,967	0	30	0	20,768			
JAPAN		2	0	61	156	2,583	3	0	16	42	1,722		
EU 12		59	67	210	340	2,319	137	126	597	820	2,977		
OTHER		100	91	150	243	813	231	376	413	959	2,745		
Subtotal:-----		3,935	4,096	5,902	7,063	46,293	5,970	6,707	10,138	12,715	79,245		
FR ORNG INC TMPL (NOV)	MT	33,207	25,980	118,476	107,222	206,881	15,324	12,941	57,534	54,822	100,853		
CANADA		23,086	23,506	49,969	58,797	161,786	10,615	13,589	23,612	34,254	87,734		
JAPAN		15,543	12,830	50,242	39,830	128,569	7,481	6,622	24,322	21,055	61,777		
HONG KONG		8,676	9,403	23,787	25,952	59,112	4,346	4,842	12,090	14,078	29,713		
OTHER		80,513	71,718	242,474	231,801	556,348	37,766	37,994	117,558	124,209	279,578		
Subtotal:-----		287,627	320,809	441,003	26,066	42,227	144,505	160,117	220,253				
FR GRPFRT (SEP)	MT	27,315	62,994	130,169	167,544	222,775	12,783	31,493	66,216	88,699	108,744		
JAPAN		11,912	9,331	92,634	81,900	116,865	6,349	4,423	45,995	40,084	61,288		
EU 12		8,427	8,186	47,327	52,037	69,444	3,959	3,063	23,606	21,923	34,612		
CANADA		6,077	4,320	42,590	31,190	51,050	3,041	2,014	21,011	16,282	25,344		
FRANCE		2,986	1,679	23,896	21,559	29,021	1,636	845	11,394	10,242	14,005		
NETHERLANDS		6,243	7,221	17,496	19,329	31,919	2,975	3,248	8,689	9,411	15,609		
OTHER		53,897	87,732	287,627	320,809	441,003	26,066	42,227	144,505	160,117	220,253		
FRESH FRUIT													
FR TANGERINES (NOV)	MT	1,060	1,608	7,913	9,074	8,616	933	1,150	6,837	7,012	7,582		
CANADA		109	426	593	843	648	85	217	467	452	506		
EU 12		32	284	119	488	180	16	239	205	472	254		
OTHER		1,201	2,317	8,626	10,405	9,444	1,033	1,606	7,509	7,936	8,342		

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 94

COMMODITY AND COUNTRY		QUANTITY												VALUE (1,000 DOLLARS)									
COUNTRY	REGION	CURR	MO	CURR	MO	YR	TOT	YR	TOT	CURR	MO	YR	TOT	CURR	MO	YR	TOT	CURR	MO	YR	TOT	LAST	YEAR
CANNED FRUIT																							
CND PEACH&NECT (JUN)	MT	776	443	4,573	4,025	5,812	838	492	5,000	4,605	6,391	2,616	2,714	3,212	1,751	1,287	2,106	1,154	997	1,421	1,247	804	
JAPAN		474	152	2,166	2,302	2,691	525	197	2,616	2,714	3,212	1,154	997	1,421	1,247	1,247	1,247	1,247	1,247	1,247	1,247	5,033	
CANADA		164	141	2,059	1,483	2,460	151	123	1,751	1,287	2,106	1,154	997	1,421	1,247	1,247	1,247	1,247	1,247	1,247	1,247	5,033	
TAIWAN		118	18	1,417	1,325	1,775	158	15	1,154	997	1,421	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	804	
MEXICO		30	99	1,116	1,363	1,467	31	86	604	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	804	
OTHER		633	307	4,388	5,051	5,611	538	315	4,064	4,407	5,033	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	1,247	5,033
Subtotal:-----		2,195	1,159	15,719	15,548	19,815	2,242	1,229	15,189	15,257	18,967												
CND PEARS (JUN)	MT	158	186	1,263	1,283	1,508	178	194	1,319	1,313	1,579	1,343	1,343	1,343	1,343	1,343	1,343	1,343	1,343	1,343	1,343	1,343	
CANADA		3	17	691	112	709	34	865	137	886	886	137	137	137	137	137	137	137	137	137	137	137	
EU 12		39	41	409	371	506	45	39	443	411	555	662	662	662	662	662	662	662	662	662	662	662	
JAPAN		39	40	466	466	466	0	0	0	0	0	308	139	139	139	139	139	139	139	139	139	139	
UNITED KINGDOM		18	0	318	148	321	26	0	308	139	139	139	139	139	139	139	139	139	139	139	139		
MEXICO		56	61	761	595	861	41	40	648	469	469	469	469	469	469	469	469	469	469	469	469		
OTHER		274	305	3,441	2,510	3,905	292	307	3,583	2,469	4,071												
Subtotal:-----		255	347	1,026	719	4,417	262	305	989	675	3,977												
CND PINEAPPLE (JAN)	MT	67	168	274	269	1,371	73	150	272	277	1,300	231	231	1,300	231	231	231	231	231	231	231	231	
JAPAN		57	127	395	260	1,354	66	110	399	28	643	643	643	643	643	643	643	643	643	643	643	643	
CANADA		3	6	110	36	786	3	5	90	94	476	476	476	476	476	476	476	476	476	476	476	476	
EU 12		101	26	127	110	533	95	22	119	94	476	476	476	476	476	476	476	476	476	476	476	476	
GERMANY		49	26	49	110	245	46	22	46	94	224	224	224	224	224	224	224	224	224	224	224	224	
OTHER		27	21	120	44	373	26	17	108	45	555	555	555	555	555	555	555	555	555	555	555	555	
Subtotal:-----		255	347	1,026	719	4,417	262	305	989	675	3,977												
FRT MIXTURES (JUN)	MT	589	490	5,261	5,051	6,542	784	602	7,151	6,316	8,786	6,083	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	
CANADA		558	504	3,241	5,069	4,708	659	544	3,776	6,316	8,786	6,083	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	5,512	
JAPAN		119	199	2,698	3,195	3,753	115	217	2,027	3,377	3,377	3,377	3,377	3,377	3,377	3,377	3,377	3,377	3,377	3,377	3,377		
HONG KONG		137	43	3,314	1,118	3,337	158	56	3,463	1,306	3,463	1,306	3,463	1,306	3,463	1,306	3,463	1,306	3,463	1,306	3,463		
PHILIPPINES		76	0	2,948	1,382	2,096	35	0	2,328	1,722	2,328	1,722	2,328	1,722	2,328	1,722	2,328	1,722	2,328	1,722	2,328		
SAUDI ARABIA		136	99	2,315	2,088	2,662	144	107	2,445	2,294	2,294	2,294	2,294	2,294	2,294	2,294	2,294	2,294	2,294	2,294	2,294		
SINGAPORE		964	577	9,489	5,683	10,797	1,116	626	9,573	6,825	11,198	6,825	11,198	6,825	11,198	6,825	11,198	6,825	11,198	6,825	11,198		
Subtotal:-----		2,580	1,912	29,267	23,586	34,896	3,010	2,152	30,763	27,924	37,386												
DRIED FRUIT																							
DRIED RAISINS (AUG)	MT	3,038	3,408	39,095	35,877	56,420	4,129	5,318	51,284	53,898	76,224	23,072	26,948	35,568	35,568	35,568	35,568	35,568	35,568	35,568	35,568	35,568	
EU 12		1,164	1,652	17,039	17,367	23,585	1,558	2,638	23,072	26,948	35,568	20,216	24,649	31,573	31,573	31,573	31,573	31,573	31,573	31,573	31,573	31,573	
UNITED KINGDOM		2,592	2,015	15,462	16,601	23,290	3,511	2,962	20,216	24,649	31,573	11,975	12,093	17,158	17,158	17,158	17,158	17,158	17,158	17,158	17,158	17,158	
JAPAN		821	829	9,491	9,123	13,256	998	1,128	11,975	12,093	17,158	11,975	12,093	17,158	17,158	17,158	17,158	17,158	17,158	17,158	17,158	17,158	
GERMANY		827	870	7,625	7,871	10,832	1,773	1,782	15,972	16,707	22,702	15,972	16,707	22,702	22,702	22,702	22,702	22,702	22,702	22,702	22,702	22,702	
DENMARK		356	260	5,155	3,985	7,205	473	369	6,297	5,743	8,998	5,743	8,998	5,743	5,743	5,743	5,743	5,743	5,743	5,743	5,743	5,743	
OTHER		2,050	3,083	27,515	26,732	35,256	2,864	5,084	36,978	42,416	49,675	36,978	42,416	49,675	49,675	49,675	49,675	49,675	49,675	49,675	49,675	49,675	
Subtotal:-----		8,505	9,377	89,697	87,081	125,798	12,278	15,146	124,450	137,669	180,188												
DRD PRUNES (AUG)	MT	5,346	1,720	35,729	19,964	48,625	7,089	4,041	50,166	45,119	69,456	17,657	21,920	25,815	25,815	25,815	25,815	25,815	25,815	25,815	25,815	25,815	
GERMANY		2,731	1,031	12,243	7,848	17,419	3,206	2,629	14,900	17,657	21,920	17,657	21,920	25,815	25,815	25,815	25,815	25,815	25,815	25,815	25,815		
JAPAN		1,452	1,160	10,416	9,589	15,311	2,398	2,928	21,383	21,383	25,815	21,383	21,383	25,815	25,815	25,815	25,815	25,815	25,815	25,815	25,815		
ITALY		987	254	9,130	4,523	11,874	1,580	1,768	11,866	11,866	20,608	11,866	20,608	20,608	20,608	20,608	20,608	20,608	20,608	20,608	20,608		
UNITED KINGDOM		586	134	5,557	3,437	7,498	701	245	6,764	4,321	9,401	4,321	9,401	9,401	9,401	9,401	9,401	9,401	9,401	9,401	9,401		
CANADA		545	375	3,446	3,236	5,052	1,162	1,162	908	7,533	10,820	7,533	10,820	10,820	10,820	10,820	10,820	10,820	10,820	10,820	10,820		
OTHER		1,054	963	14,179	10,671	18,937	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159	1,159		
Subtotal:-----		8,397	4,218	64,388	43,460	87,925	12,171	10,134	95,677	96,737	134,380												
FRUIT JUICES (SSE)																							
ORANGE JUICE CNC (DEC)	KL	11,818	7,471	26,586	22,254	107,753	5,315	3,103	10,889	9,675	42,269	18,293	16,162	46,741	46,741	46,741	46,741	46,741	46,741	46,741	46,741		
EU 12		10,920	2,164	41,015	9,862	99,111	4,891	4,526	18,293	16,162	46,741	18,293	16,162	46,741	46,741	46,741	46,741	46,741	46,741	46,741	46,741		
CANADA		6,529	3,739	14,913	14,117	42,560	2,878	1,678	6,163	6,163	46,741	6,163	6,163	4									

**U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
MAR 94**

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
MAR 94

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)																		
COUNTRY	REGION	CURR	LAST	MO	CURR	MO	YR	TDT	LAST	YR	TDT	CURR	MO	YR	TDT	LAST	YR	TDT	CURR	MO	YR	TDT	LAST			
FR FRT & MLNS																										
FR APPLES(JUL)	MT	291	438	575	2,734	28,513	1,239	358	572	3,033	30,602															
NEW ZEALAND		5,310	2,229	36,966	26,803	46,527	1,907	1,188	13,096	11,923	16,772															
CANADA		4,816	5,369	10,010	16,521	35,577	1,625	1,877	4,692	8,152	18,006															
OTHER		Subtotal:-----	10,417	8,036	47,550	45,758	110,401	3,771	3,424	18,360	23,107	65,380														
FR PEARS(JUL)	MT	13,343	11,348	29,747	27,628	44,689	4,431	4,514	9,955	10,038	14,858															
CHILE		3,711	3,833	6,690	6,875	14,604	2,476	1,980	4,205	3,782	9,230															
ARGENTINA		93	912	2,271	2,792	5,479	1,21	733	5,335	5,768	8,178															
OTHER		Subtotal:-----	17,146	16,093	38,708	37,294	64,472	7,027	7,227	19,495	19,589	32,266														
APRICOT (MAY)	MT	0	0	699	781	699	0	0	441	489	441															
NEW ZEALAND		14	14	158	157	158	26	0	405	283	405															
OTHER		0	37	38	103	55	0	110	92	221	132															
Subtotal:-----		14	37	894	1,042	911	26	110	938	993	978															
PEACH-NEC(MAY)	MT	6,949	4,588	40,833	42,869	40,869	4,323	2,973	25,786	27,590	25,810															
CHILE		74	26	983	252	1,088	140	32	804	240	997															
OTHER		Subtotal:-----	7,022	4,614	41,816	43,121	41,956	4,463	3,005	26,590	27,830	26,807														
PLUM PRUNE (MAY)	MT	5,814	4,333	21,931	19,127	23,893	3,663	2,907	13,882	12,739	15,116															
CHILE		0	23	98	122	0	15	80	117	80	15,116															
OTHER		Subtotal:-----	5,814	4,355	22,029	19,249	23,990	3,663	2,922	13,961	12,856	15,196														
FRESH GRAPES (MAY)	MT	92,392	76,983	244,872	213,465	284,846	63,994	56,240	179,470	163,409	207,103															
CHILE		0	37	3,056	41,305	37,056	0	0	67,144	55,211	67,144															
MEXICO		20	310	1,940	1,279	2,023	14	410	790	1,080	1,080															
OTHER		Subtotal:-----	92,413	77,293	283,868	256,048	323,924	64,009	56,649	247,403	219,700	275,101														
FR RASPBRY (JAN)	MT	0	0	0	0	5,122	0	0	0	0	9,292															
CANADA		148	229	380	520	774	209	385	596	865	9,292															
OTHER		Subtotal:-----	147	229	380	521	5,896	209	385	596	865	10,776														
FR STRAWBRIS (JAN)	MT	3,785	4,454	5,870	7,507	12,747	7,872	8,648	11,517	16,194	17,985															
MEXICO		25	21	241	241	1,480	29	29	421	197	17,985															
OTHER		Subtotal:-----	3,810	4,455	6,112	7,599	14,227	7,900	8,649	11,938	16,391	21,476														
FR BANANA (JAN)	MT	74,333	69,358	241,182	183,506	922,519	23,427	20,674	71,700	52,716	272,504															
COSTA RICA		64,670	68,909	193,806	204,161	761,367	20,693	17,825	53,275	52,483	205,877															
ECUADOR		51,865	68,599	142,198	168,487	596,321	14,613	21,261	40,667	49,133	166,144															
COLOMBIA		116,811	102,727	287,722	294,877	1,232,936	37,281	28,337	85,120	75,100	350,376															
OTHER		Subtotal:-----	317,678	313,592	866,907	851,032	3,513,144	96,014	89,097	250,761	229,433	994,903														
FR MANGO (JAN)	MT	5,129	2,728	5,482	3,544	94,439	5,618	2,221	5,887	3,008	71,626															
MEXICO		868	807	3,760	3,104	16,518	6,633	755	4,047	3,426	15,619															
OTHER		Subtotal:-----	5,998	3,534	9,242	6,648	110,957	6,251	2,976	9,934	6,434	87,245														
FR PINAPPLE (JAN)	MT	7,202	7,712	17,607	18,207	72,226	3,065	3,111	7,631	7,425	30,880															
COSTA RICA		3,130	3,414	6,722	8,918	26,273	854	939	1,797	2,454	7,482															
HONDURAS		3,619	1,524	9,209	2,940	25,896	828	357	2,217	806	6,986															
OTHER		Subtotal:-----	13,951	12,650	33,538	30,065	124,395	4,747	4,408	11,645	10,685	45,348														
FR CANTLPE (MAY)	MT	8,904	11,320	80,765	45,781	104,864	1,667	2,631	24,193	12,977	29,666															
MEXICO		10,773	9,486	24,183	28,279	35,094	6,486	4,608	13,445	13,155	19,756															
COSTA RICA		7,017	13,033	49,384	48,473	55,437	5,774	2,786	11,986	11,018	14,510															
HONDURAS		6,917	8,710	39,713	42,069	45,451	2,009	2,439	8,963	12,001	11,533															
OTHER		Subtotal:-----	33,611	42,548	186,024	164,601	240,846	11,936	12,463	58,587	49,151	75,505														
FR MELON OT (MAY)	MT	4,937	2,058	45,604	34,984	51,787	1,327	731	16,138	12,441	17,944															
MEXICO		12,202	13,905	16,801	21,332	24,845	3,331	5,616	7,765	8,672	11,269															
COSTA RICA		8,594	8,649	36,998	37,762	45,268	2,966	2,645	11,932	12,602	14,826															
OTHER		Subtotal:-----	25,733	24,612	99,403	94,078	121,899	9,624	8,992	35,835	33,715	44,039														
FR ORANGES (NOV)	MT	0	0	0	0	4,556	0	0	0	0	2,267															
AUSTRALIA		876	825	3,285	3,204	10,350	335	335	378	1,342	1,553															
OTHER		Subtotal:-----	876	826	3,285	3,205	10,350	335	384	1,342	1,554	2,007														
CND BLK OLV (NOV)	MT	1,148	1,234	4,412	6,004	12,275	2,416	2,392	9,597	11,240	24,927															
EU 12		1,014	3,707	4,997	10,260	1,935	1,931	7,662	7,662	8,974	19,913															
SPAIN		56	356	1,229	1,067	2,661	106	636	2,220	1,859	4,733															
MOROCCO		4	19	49	79	125	9	18	81	133	236															
OTHER		Subtotal:-----	1,207	1,608	5,689	7,150	15,061	2,531	3,046	11,898	13,232	29,896														
CND GRN OLV (NOV)	MT	4,011	3,843	16,988	15,598	41,192	10,638	9,770	45,200	39,314	104,739															
EU 12		3,924	3,793	16,591	15,241	40,160	10,486	9,682	44,532	38,695	102,781															
SPAIN		229	191	867	856	2,058	333	221	4,136	3,695	102,331															
OTHER		Subtotal:-----	4,240	4,034	17,855	16,454	43,249	10,971	9,951	40,566	40,496	108,070														
CND PEACH (JUN)	MT	1,284	1,356	19,126	14,300	20,063	824																			

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
MAR 94

COMMODITY AND COUNTRY		QUANTITY								VALUE (1,000 DOLLARS)									
		COUNTRY REGION	CURR LAST	MO YR	CURR LAST	MO YR	YR LAST	TDT CURR	YR LAST	LAST YEAR	CURR LAST	MO YR	CURR LAST	MO YR	YR LAST	TDT CURR	YR LAST	TDT CURR	LAST YEAR
DATES (SEP)	MT	PAKISTAN	587	807	2,479	2,275	3,720	654	762	2,733	2,360	4,036							
		CHINA, PEOPLES R	99	60	518	330	1,090	70	46	550	412	1,152							
		OTHER	121	55	530	310	689	250	105	1,019	666	1,330							
		Subtotal:-----	807	923	3,527	2,914	5,498	974	913	4,302	3,438	6,518							
DRD FIG (SEP)	MT	EU 12	2	0	969	761	969	5	0	2,403	1,820	2,403							
		GREECE	26	0	943	727	943	5	0	2,301	1,695	2,301							
		TURKEY	76	98	398	856	1,240	40	106	705	1,337	1,300							
		OTHER	0	54	356	1,263	562	0	38	172	614	266							
		Subtotal:-----	77	153	1,723	2,881	2,771	45	144	3,280	3,771	3,969							
DRD RAISIN (AUG)	MT	MEXICO	215	0	3,472	3,413	3,662	198	0	2,384	3,151	2,508							
		CHILE	0	0	369	507	1,441	0	433	618	1,774								
		TURKEY	139	200	989	1,850	1,526	152	217	1,073	1,882	1,655							
		OTHER	2	105	26	327	87	4	75	53	347	134							
		Subtotal:-----	357	304	4,856	6,097	6,717	353	292	3,943	5,999	6,070							
FRUIT JUICE (SSE)	KL	APPLE JUIC (JUL)	24,788	31,154	155,119	177,183	229,468	7,038	6,430	49,907	37,862	69,762							
		EU 12	24,277	21,198	134,599	218,600	222,727	514	568	41,168	41,050	58,379							
		ARGENTINA	25,572	26,310	128,455	138,366	186,784	5,510	5,543	41,221	30,084	56,118							
		GERMANY	15,468	52,915	289,044	379,323	389,967	5,226	8,176	98,730	77,904	118,171							
		OTHER	44,553	76,268	574,762	775,105	822,162	13,278	14,973	187,805	156,816	246,312							
FCOJ (DEC)	KL	BRAZIL	55,841	109,335	286,835	445,027	1,089,726	8,513	20,882	46,205	83,738	190,381							
		OTHER	11,381	38,253	33,187	79,946	137,517	1,948	9,809	6,433	19,418	25,686							
		Subtotal:-----	67,222	147,588	320,022	524,973	1,227,243	10,461	30,692	52,638	103,156	216,066							
GRAPE JU (JAN)	KL	SWEDEN	10,363	0	22,182	0	51,169	3,405	0	7,464	0	16,067							
		EU 12	423	1,955	847	5,043	24,178	281	966	547	2,620	8,460							
		OTHER	4,363	1,039	13,588	3,959	54,769	1,601	505	5,301	4,691	19,669							
		Subtotal:-----	15,150	2,994	36,617	9,002	130,116	5,287	1,471	13,312	4,312	44,196							
PNEAPL JUCN (JAN)	KL	THAILAND	15,888	10,246	45,141	36,969	156,558	3,393	1,817	9,341	6,770	30,322							
		PHILIPPINES	8,266	5,415	27,301	24,732	113,215	1,686	1,003	5,842	4,705	23,255							
		OTHER	3,060	2,142	7,025	5,474	24,227	873	558	2,041	1,380	6,782							
		Subtotal:-----	27,215	17,803	79,467	67,175	294,000	5,953	3,378	17,224	12,855	60,359							
PNEAPL JUNC (JAN)	KL	PHILIPPINES	1,052	2,686	7,591	11,986	29,454	388	847	2,816	4,114	10,933							
		OTHER	187	1,581	2,783	5,473	13,450	100	719	957	2,192	4,309							
		Subtotal:-----	1,239	4,267	10,374	17,460	42,904	488	1,567	3,773	6,307	15,242							
FROZEN FRUIT	MT	ZFN STRBRY (DEC)	3,621	5,384	7,464	7,820	18,446	3,292	5,130	7,235	7,475	17,277							
		MEXICO	66	139	474	384	1,274	409	309	1,844	8,123	3,826							
		OTHER	3,687	5,522	7,938	8,205	19,720	3,701	5,440	9,079	8,599	21,103							
FRESH VEGETABLES	MT	FR BEANS (OCT)	1,653	2,064	10,205	8,785	11,424	1,736	2,531	12,395	11,553	14,214							
		MEXICO	5	6	92	248	1,729	17	12	155	1,178	14,783							
		OTHER	1,658	2,070	10,296	9,033	12,152	1,753	2,543	12,550	11,731	14,998							
FR CARROT (OCT)	MT	CANADA	1,195	2,640	29,814	34,268	39,943	350	696	7,761	8,121	10,429							
		MEXICO	1,716	1,236	6,364	6,729	10,923	616	462	1,841	1,599	3,267							
		OTHER	161	57	461	159	566	112	39	295	4,370								
		Subtotal:-----	3,071	3,932	36,639	41,156	51,432	1,077	1,198	9,897	9,815	14,067							
FR CABBAGE (OCT)	MT	CANADA	2,626	347	10,498	6,956	17,625	612	76	2,170	1,649	4,420							
		MEXICO	1,650	374	4,606	3,080	8,318	364	62	950	507	1,542							
		OTHER	87	2	116	144	871	44	6	69	48	565							
		Subtotal:-----	4,363	722	15,219	10,181	26,815	1,020	144	3,189	2,204	6,526							
FR CELERY (OCT)	MT	MEXICO	2,821	1,699	8,529	6,373	11,581	1,192	447	3,586	1,847	4,719							
		CANADA	0	18	614	3,999	4,643	0	11	142	133	1,340							
		OTHER	139	0	371	60	600	23	0	63	19	117							
		Subtotal:-----	2,960	1,717	9,513	6,833	16,216	1,216	458	3,790	1,999	6,176							
FR CUCMBR (OCT)	MT	MEXICO	33,909	36,301	182,447	183,899	213,505	10,598	11,075	59,231	79,303	76,639							
		OTHER	32,863	2,611	19,146	15,330	25,337	945	719	4,982	2,074	8,554							
		Subtotal:-----	36,772	38,911	201,593	199,230	238,842	11,544	11,794	64,213	83,376	85,192							
FR CAULFLWR (OCT)	MT	CANADA	0	0	93	536	3,018	0	0	26	174	998							
		MEXICO	236	182	664	1,498	666	135	57	316	446	319							
		OTHER	20	0	20	0	192	15	0	15	0	133							
		Subtotal:-----	256	182	778	2,034	3,876	149	57	357	620	1,449							
FR GARLIC (OCT)	MT	MEXICO	690	1,110	1,000	1,260	10,500	774	857	1,321	1,023	11,055							
		CHINA, PEOPLES R	4	636	956	13,595	14,338	3	427	766	6,758	7,236							
		OTHER	1,132	1,223	2,956	3,327	4,333	1,429	1,586	3,559	4,106	4,854							
		Subtotal:-----	1,826	2,969	4,912	18,183	29,172	2,206	2,870	5,647	11,886	23,145							
FR ONION (OCT)	MT	MEXICO	54,577	50,392	118,595	111,098	192,287	13,232	20,237	53,801	67,821	93,837							
		OTHER	2,407	20,320	10,632	58,211	24,451	776	6,546	4,180	20,316	10,015							
		Subtotal:-----	56,984	70,712	129,226	169,309	216,739	14,008	26,783	57,981	88,137	103,853							
FR PEPPERS (OCT)	MT	MEXICO	24,231	29,634	105,471	106,394	138,708	17,355	26,559	90,031	103,220	134,106							
		EU 12	191	59	3,069	4,736	16,090	823	293	8,975	11,392	37,118							
		NETHERLANDS	179	51	2,959	4,580	15,624	759	245	8,625	10,904	35,960							
		OTHER	203	100	865	866	3,994	381	136	1,234	6,733	6,733							
		Subtotal:-----	24,624	29,794	109,405	111,996	158,793	18,558	26,989	100,240	116,005	177,240							

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
MAR 94

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR		
FR SEED POT(OCT)	MT	19,242	37,171	39,530	66,631	74,524	3,121	8,544	5,855	13,835	11,499		
CANADA		9	18	44	64	137	5	9	23	36	81		
OTHER		19,251	37,188	39,574	66,695	74,661	3,126	8,554	5,878	13,871	11,579		
Subtotal:-----													
FR TBL POT(OCT)	MT	33,448	28,286	137,357	145,991	227,512	5,470	7,257	21,250	34,052	38,014		
CANADA		0	12	13	50	13	0	1	3	19	3		
OTHER		33,448	28,298	137,370	146,041	227,525	5,470	7,258	21,254	34,072	38,017		
Subtotal:-----													
FR TOMATO(OCT)	MT	71,556	83,604	223,668	254,856	365,168	54,022	40,439	187,000	223,788	289,182		
MEXICO		873	469	4,174	5,793	15,744	532	640	3,405	6,811	18,273		
OTHER		72,429	84,073	227,842	260,649	380,912	54,554	41,079	190,405	230,599	307,454		
Subtotal:-----													
FR ASPARG(OCT)	MT	5,945	5,958	17,496	13,413	22,613	7,915	9,934	26,405	23,194	31,593		
MEXICO		1	26	5,149	6,415	2,239	1	61	8,489	8,019	7,520		
OTHER		5,947	5,984	22,644	19,828	29,852	7,917	9,995	31,894	31,213	39,213		
Subtotal:-----													
CANNED VEGETABLES													
CND TOM PST(JUL)	MT	2,718	1,925	2,718	2,118	20,312	2,024	1,241	2,024	1,370	14,818		
MEXICO		247	751	5,569	1,700	1,176	156	710	1,360	4,122			
CHILE		182	1,317	3,252	6,047	3,881	186	940	3,323	3,964	2,789		
OTHER		3,146	3,994	11,539	9,865	31,369	2,366	2,891	7,403	6,694	21,730		
Subtotal:-----													
CND TOM SAUCE(JUL)	MT	56	510	3,045	3,860	4,465	30	387	1,655	2,505	2,499		
CANADA		1,570	159	1,754	580	2,239	1,020	79	1,098	335	1,325		
CHILE		98	35	1,323	503	1,627	61	25	853	353	1,050		
DOMINICAN REPUBL		54	621	1,271	2,550	1,552	36	1,703	907	3,070	1,115		
OTHER		1,779	1,325	7,393	7,495	9,883	1,146	2,194	4,513	6,263	5,989		
Subtotal:-----													
CND TOMATO(JUL)	MT	1,009	637	10,745	6,054	16,630	487	392	4,422	3,042	7,462		
CHILE		1,325	79	13,413	12,193	16,665	397	353	5,031	3,827	6,087		
EU 12		261	12,569	11,946	15,580	391	343	4,359	3,750	5,398			
ITALY		1,308	938	10,526	11,543	11,901	205	395	4,836	4,238	4,363		
OTHER		2,891	2,553	34,784	29,749	44,297	1,089	1,140	13,289	11,107	17,312		
Subtotal:-----													
CND MSHROOM(JUL)	MT	1,045	1,266	12,541	7,120	15,958	2,440	3,079	31,592	15,958	39,390		
INDONESIA		814	1,723	8,625	11,539	11,240	1,316	2,351	15,231	18,841	19,532		
CHINA, PEOPLES R		1,979	3,378	15,944	17,714	21,018	4,320	7,357	35,363	39,565	45,934		
OTHER		3,837	6,368	37,111	36,372	48,216	8,076	12,787	82,185	74,365	104,856		
Subtotal:-----													
FROZEN VEGETABLES													
FZN BROCOLI(SEP)	MT	21,064	14,486	106,303	64,780	159,838	14,618	10,332	70,949	45,189	106,192		
MEXICO		763	715	11,330	12,950	15,408	473	467	8,224	8,435	10,933		
OTHER		21,286	15,201	117,633	77,730	175,246	15,091	10,799	79,173	53,624	117,125		
Subtotal:-----													
FZN CAULFLR(SEP)	MT	663	880	18,636	24,409	20,199	485	611	13,261	21,464	14,433		
MEXICO		143	152	1,011	2,090	2,899	91	84	694	995	1,249		
OTHER		806	1,032	19,047	26,500	22,097	576	695	13,955	22,459	15,682		
Subtotal:-----													
FZN POTATO(SEP)	MT	13,280	11,848	64,411	73,622	121,553	7,377	6,702	36,046	41,194	66,834		
CANADA		1	27	167	402	402	5	24	116	176	259		
OTHER		13,281	11,876	64,579	73,825	121,956	7,381	6,726	36,162	41,370	67,093		
Subtotal:-----													
TREE NUTS													
PISTACHIO NSH(SEP)	MT	0	0	0	15	40	0	0	0	35	81		
HONG KONG		0	0	7	107	7	0	8	24	296	24		
TURKEY		0	0	0	0	0	2	0	2	1	2		
OTHER		0	2	7	122	47	2	8	26	332	107		
Subtotal:-----													
CASHEW NUT(AUG)	MT	2,724	3,852	23,401	26,409	31,066	11,512	15,775	102,952	109,887	136,033		
INDIA		1,841	1,285	19,550	14,090	27,735	7,775	6,450	77,024	60,956	109,075		
BRAZIL		469	372	4,606	3,009	5,845	1,719	1,430	15,287	10,371	19,312		
OTHER		5,033	5,510	47,557	43,508	64,645	21,006	23,656	195,263	181,214	264,421		
Subtotal:-----													
FILBERTS(AUG)	MT	338	109	2,951	2,511	3,944	821	428	7,768	8,006	10,245		
TURKEY		2	7	52	99	77	9	42	225	305	300		
OTHER		340	117	3,003	2,610	4,022	831	470	7,992	8,311	10,544		
Subtotal:-----													
PECANS NSH(SEP)	MT	185	2,218	12,704	6,398	12,772	433	2,411	33,667	7,318	33,861		
MEXICO		0	0	148	327	148	0	0	449	1,081	449		
OTHER		185	2,218	12,852	6,726	12,920	433	2,411	34,116	8,399	34,310		
Subtotal:-----													
WINES													
CHMP&SPRK WN(JAN)	KL	1,632	1,392	3,709	3,688	30,523	16,447	12,955	34,506	33,394	265,363		
EU 12		643	558	1,342	1,379	10,065	12,236	9,491	24,647	23,649	179,059		
FRANCE		1,613	4,700	10,328	11,336	55,169	32,541	26,291	62,619	58,650	303,623		
ITALY		618	451	1,303	1,320	11,753	2,696	1,895	5,721	5,778	50,998		
OTHER		32	69	54	107	302	84	190	201	292	1,034		
Subtotal:-----													
FT&VERM WN(JAN)	KL	1,664	1,461	3,763	3,795	30,825	16,530	13,145	34,707	33,686	266,397		
EU 12		940	1,091	2,058	2,632	12,389	3,383	4,287	7,411	10,011	48,713		
ITALY		539	590	1,042	1,438	6,954	1,307	1,487	2,393	3,526	16,829		
SPAIN		233	256	673	711	3,278	967	975	2,758	2,983	14,484		
PORTUGAL		78	153	167	296	1,295	710	1,405	1,564	2,736	13,324		
OTHER		10	26	41	45	159	44	71	169	163	671		
Subtotal:-----													
OTH GP WINE(JAN)	KL	16,366	11,117	2,099	2,677	12,547	3,427	4,357	7,580	10,174	49,384		
EU 12		13,104	15,303	27,128	35,731	152,864	51,407	49,522	103,357	114,526	553,012		
FRANCE		5,163	4,700	10,328	11,336	55,169	32,541	26,291	62,619	58,650	303,623		
ITALY		6,144	8,490	12,952	19,358	75,390	14,162	17,349	30,647	42,493	186,307		
OTHER		3,261	3,666	9,547	9,519	42,637	7,484	8,089	20,282	21,867	97,398		
Subtotal:-----													
OTH WN PROD(JAN)	KL	746	991	1,741	2,671	9,216	1,541	1,723	3,692	4,636	17,236		
JAPAN		340	168	737	449	2,276	922	625	2,101	1,626	7,018		
EU 12		307	391	732	1,167	9,709	421	479	1,044	1,528	5,444		
CANADA		20	361	60	293	2,084	43	458	107	965	2,053		
OTHER		78	71	213	263	1,148	155	161	440	518	2,21		
Subtotal:-----													
CUT FLOWERS													
ROSES(JAN)	NONE	0	0	0	0	0	0	5,941	8,686	28,967	31,674		
COLOMBIA		0	0	0	0	0	0	1,766	2,172	9,706	12,450		
OTHER		0	0	0	0	0	0	7,707	10,857	38,673	44,124		
Subtotal:-----													
CARNATIONS(JAN)	NONE	0	0	0	0	0	0	7,082	9,441	23,275	24,732		
COLOMBIA		0	0	0	0	0	0	1,844	1,478	501	82,941		
OTHER		0	0	0	0	0	0	7,266	9,920	23,776	25,593		
Subtotal:-----													

UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D.C. 20250.

The United States Department of Agriculture (USDA) prohibits discrimination in its programs on the basis of race, color, national origin, sex, religion, age, disability, political beliefs and marital or familial status. (Not all prohibited bases apply to all programs). Persons with disabilities who require alternative means of communication of program information (braille, large print, audiotape, etc.) should contact the USDA Office of Communications at (202) 720-5881 or (202)720-7808 (TDD).

To file a complaint, write the Secretary of Agriculture, U.S. Department of Agriculture, Washington, D.C., 20250, or call (202) 720-7327 (voice) or (202) 720-1127 (TDD). USDA is an equal opportunity employer.